Program

Case Data Gatherer
Measurable Objectives
Attendance Tracking
Program Units of Service
Volunteer Activities
Group Activities
Web Reporting

AGENCY USER MANUAL

Children's Services Council
of Broward County
Our Focus is Our Children.

Revised: August 2007

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Chapter 1 – SAMIS Overview and Standards

General Overview

SAMIS (Services and Activities Management Information System) is a Web-based reporting system developed to increase the efficiency of the program and financial data transfer between a Children's Services Council and its funded agencies. SAMIS has operated since July 1999.

SAMIS was expanded in August 2001, for use by multiple Children's Service Councils in Florida. (Children's Services Councils are specialized taxing districts in Florida.) The counties participating include Broward, Duval (Jacksonville), Martin, Palm Beach and Pinellas.

Program Side – The program side of SAMIS includes Case Data Gatherer (CDG), Program Units of Service, CDG Client Wait List, Measurable Objectives, CDG Reports, Group Activities, Volunteer Activities, Pick List Maintenance, Attendance Tracking, and Reverse EDI. These modules allow the CSC to track the following concerning each participant: demographic information, referrals, specific services and activities, measurable objectives, waiting time for program services, and attendance. Other modules track distinct group events, record volunteer participation, provide for greater program-level data entry customization, and allow extensive reporting in SAMIS.

Fiscal Side - Program Funders, Funder Amendments, Budgets, Budget Amendments, Reimbursements, and other associated modules provide all the fiscal functions necessary for the financing of specific programs.

SAMIS Technical Support Desk

The Children's Services Council has a full time position dedicated to the success of SAMIS. The Technical Support Desk provides technical assistance to all SAMIS users regarding the application, technology supporting SAMIS, manages user accounts, and provides training. The SAMIS Analyst, Shawanda Spencer may be reached at (954) 377-1684 or via email sspencer@cscbroward.org.

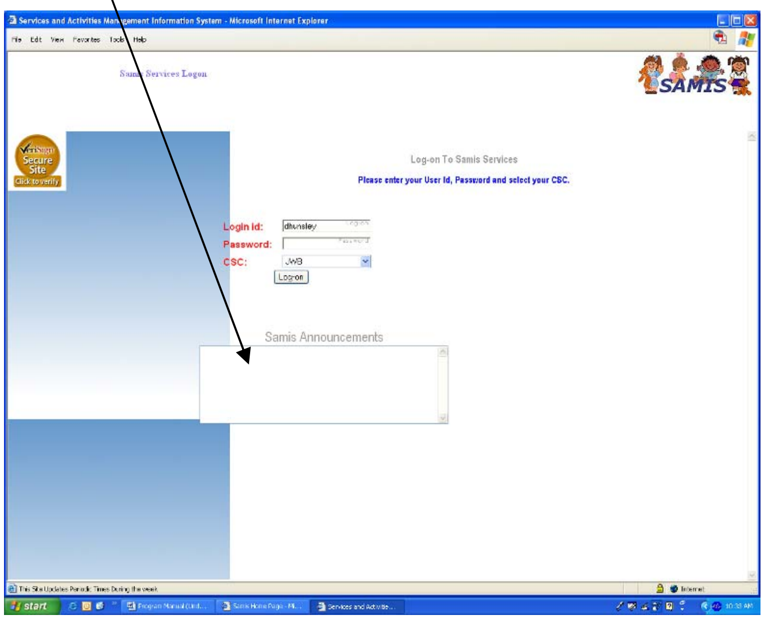
SAMIS Training

SAMIS training is offered, without cost, at least monthly for Program and Fiscal users. Although this training is not required, it is suggested that all new users attend training for a complete overview of the system. In addition to the training for beginners, the CSC periodically conducts special "refresher" courses on certain portions of the SAMIS system. Training dates and times are published on the CSC website SAMIS Announcement Update Screen or contact Shawanda Spencer, Technical Support Desk at (954) 377-1684.

Communication with CSC Funded Agencies

The CSC is committed to communication with all of our funded agencies regarding SAMIS. To accomplish this, the CSC has established several modes of communication regarding SAMIS.

<u>State-wide SAMIS Announcements</u> – A statewide SAMIS Announcements screen will appear, each time you navigate to the SAMIS login page. This screen is intended to provide you with system-wide information that users will need to know, such as scheduled maintenance where the system may be down temporarily.



<u>County-wide SAMIS Announcements</u> – Once you have logged in, a secondary announcement screen appears which is designed for users in a specific CSC. This screen includes up to the minute information pertaining to the CSC, downloads of manuals and access request forms, and training information. A "last updated" date is posted on the screen so the user will know the last time an update has been made. Users can proceed to the main menu at any time by clicking the OK button.

<u>SAMIS E-Mail</u> –The CSC has created an e-mail contact list that includes all users who have registered an e-mail address. All users are encouraged to keep the helpdesk apprized of any e-mail address changes. SAMIS E-Mail will be used to relay messages during emergencies.

<u>SAMIS News</u> – The SAMIS News is a periodic newsletter that is mailed to SAMIS users. It is intended to give hints for accomplishing tasks, list upcoming events, and provide reminders. This newsletter will be sent out prior to major enhancement rollouts.

SAMIS Web Sites

SAMIS is accessible through the Internet by using a dial-up, Cable, ADSL or T1 line to connect to your internet service provider. Internet Explorer 7.0, SP1 or higher must be used with SAMIS. There are two similar web sites that relate to SAMIS (SAMIS Production and SAMIS Training):

- SAMIS Training Site (**https://training.SAMISCSC.org)** The training site is available for training and to practice SAMIS processes. The Training Site is identified with a description below the SAMIS logo. Data cannot be transferred from the training site to the live site.
- SAMIS Production Site (**https://www.SAMISCSC.org)** The production site is where all final information should be entered.

Security Overview

User IDs and Passwords

- Each user of SAMIS should have his or her own password.
- Sharing of **User ID's** and **passwords** is not permitted. Passwords can be changed by the user at any time.
- For each new user, an **Access Request Form** must be filled out by the agency, identifying the specific access requested. This form should be signed by an authorized representative from the agency and faxed to (954) 377-1683. (Access request forms can be found in the SAMIS Announcements Pages.)
- There is no limit to the number of users an agency or program may be assigned.
- ***Since SAMIS can be reached from any location with Internet access, it is important that the agencies notify the CSC SAMIS Help Desk immediately when someone leaves.***
- Sequential user IDs and passwords are not allowed by the system. This includes passwords like 12345 or abcdefg.

How Secure is the Data Sent to the CSC?

Since the information sent to the CSC through the agency web browser is transmitted over the Internet, extensive precautions have been taken to ensure the security of transmitted data.

- The data is secured using a digital certificate provided through VeriSign, the worlds leading certificate authority. This step ensures that you are connecting to the real SAMIS website, never to an impostor.
- All data traffic between the agency and SAMIS across the Internet is encrypted using Secure Socket Layer technology. This technology encodes the data into an unreadable form which can only be deciphered by the intended recipient (the agency or SAMIS). This layer of privacy protection ensures that information cannot be viewed if unauthorized parties intercept it.
- Name and birth date information entered for SAMIS participants is encoded on the agency computer using an algorithm to generate a unique participant identifier. In this way, the unique participant identifier, rather than the participant name, is transmitted over the Internet connection.

Chapter 2 - Technical Requirements and Settings

Hardware Requirements

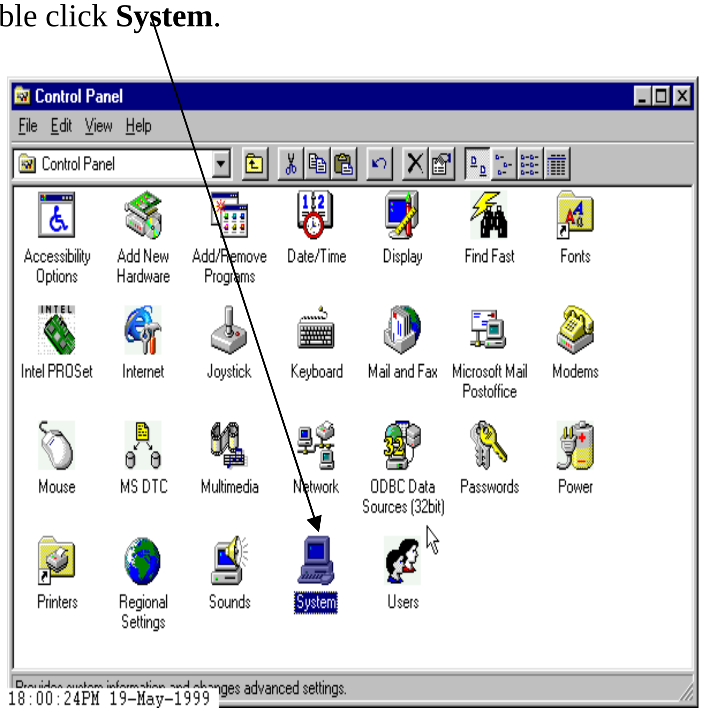
- **IBM Compatible PC**
- **DSL** connection, **broadband Internet** connection, or connection through a local area network (a 56K modem will work, but is not recommended due to the slow speeds).
- **VGA Monitor**

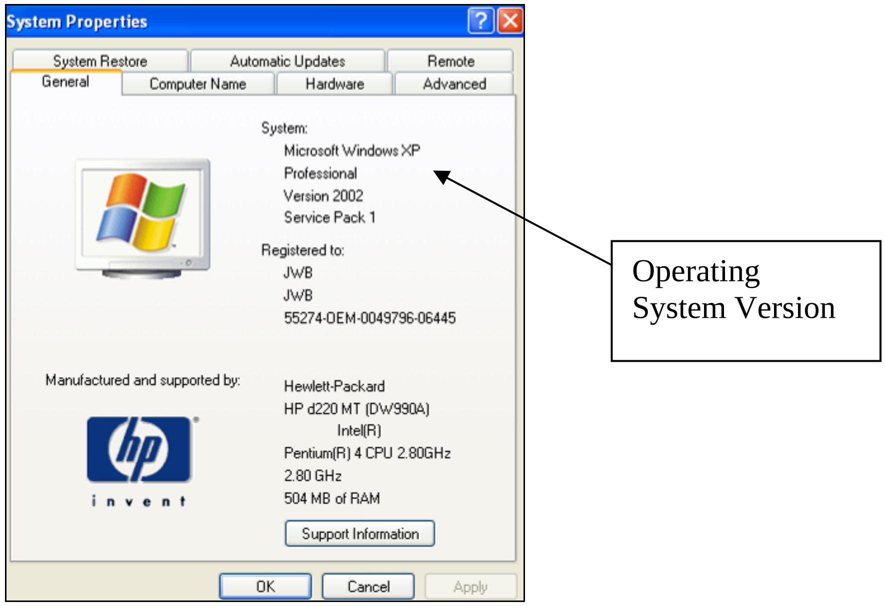
Operating System Requirements

Operating Systems -**Windows 98b, Windows NT 4.x., Windows 2000, Windows ME, or Windows XP.**

To determine the version of Windows that resides on your computer do the following:

1. From the **Start** menu, navigate to **Settings**, then **Control Panel**
2. Then double click **System**.



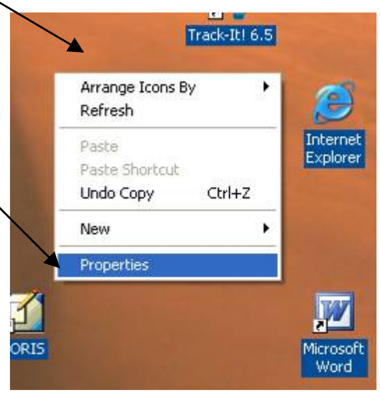


Monitor Settings

The screen resolution of the monitor should be set at 1024 X 768 pixels or higher with Small Font to view SAMIS optimally. Lower monitor settings will result in more difficult navigation while in SAMIS.

To change the monitor settings:

1. **Right click anywhere that there is space** (not an icon) on your computer screen.
2. Click **Properties**



3. Select the **Settings tab**.
4. Use the Screen Resolution selector to change the setting to **1024 X 768** (Larger screen resolutions will work as well.)
5. Click the **Apply** button.

6. The settings will change and a box will appear asking if you wish to keep these setting changes. Click **Yes** to accept the changes.
7. Click **OK** to close the Display Properties box.

Internet Explorer Version

Internet Explorer, Version 7.0, Service Pack 1 must be used to access SAMIS. Internet Explorer 7.0, SP 1 can be downloaded free from the Microsoft Web site at (www.microsoft.com/downloads). For further instructions on how to download, contact the CSC SAMIS Help Desk.

The following Internet browsers are **NOT** compatible with SAMIS:

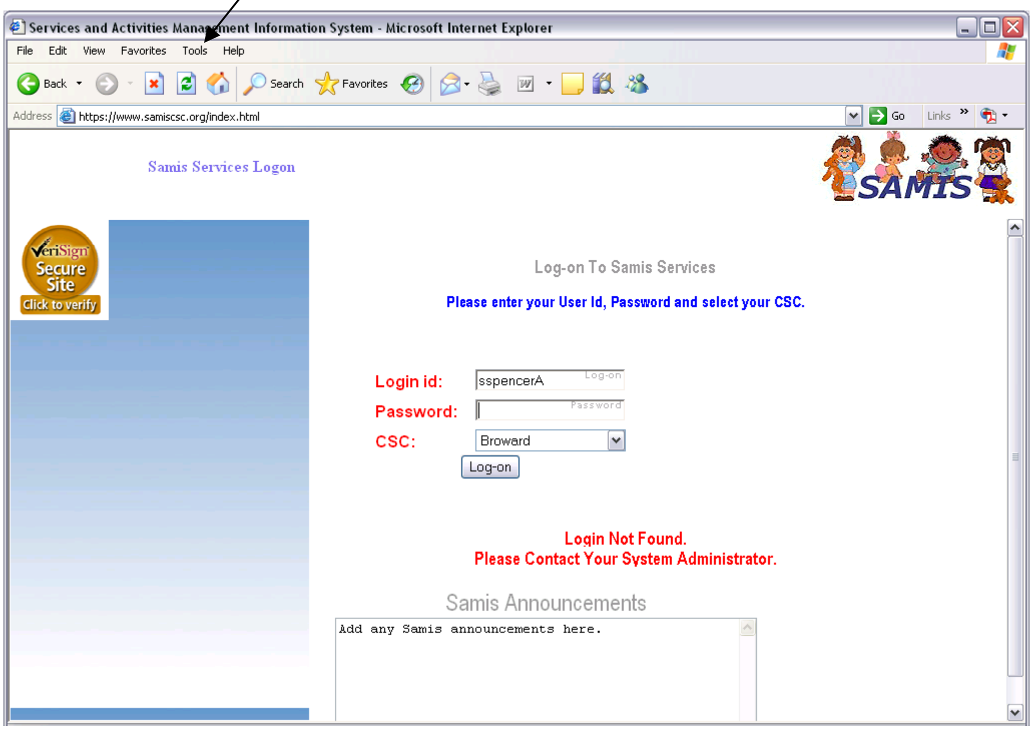
- Internet Explorer 3.0, 4.0, 5.0 and 5.5
- Any version of Netscape Navigator

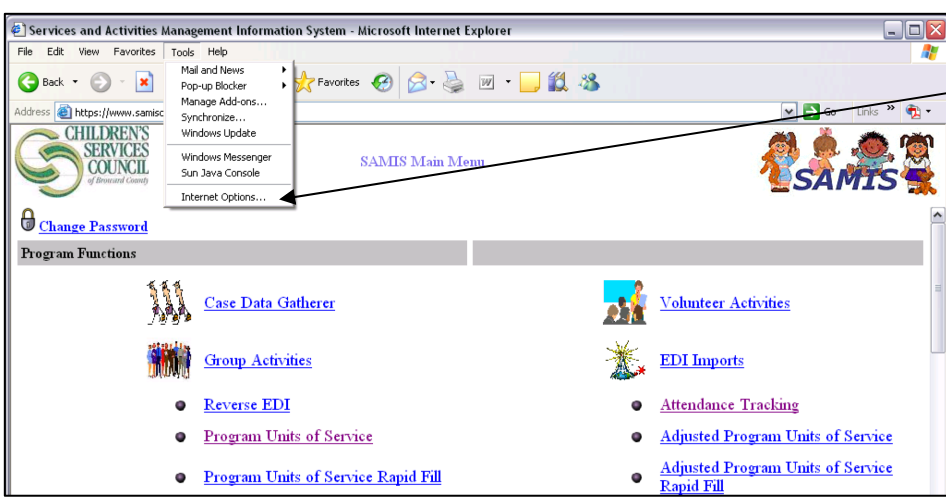
Configuring Internet Explorer 7.0 SP1 for SAMIS

To access SAMIS, users must have Microsoft Internet Explorer 7.0 installed and properly configured on their computer. This section will guide you through the process of configuring Internet Explorer 7.0 SP1 for SAMIS.

Once you have Microsoft Internet Explorer 7.0 SP1 or a later version installed on your computer, **Internet Explorer security settings must be properly configured for SAMIS to work properly**. Follow the steps below to configure Internet Explorer.

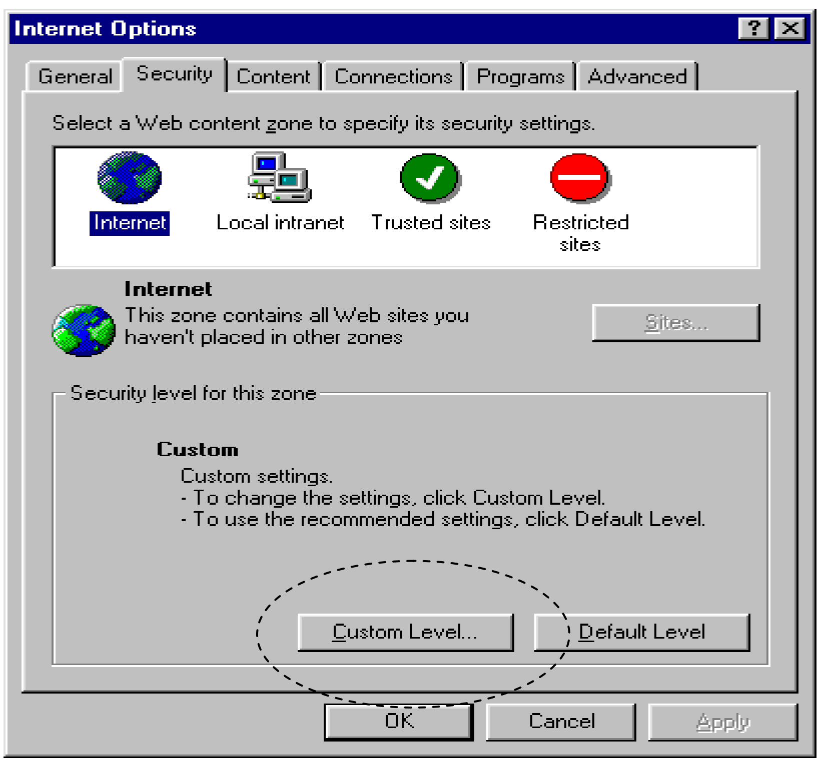
1. From the menu bar, click **Tools**. Then select **Internet Options** from the sub-menu.



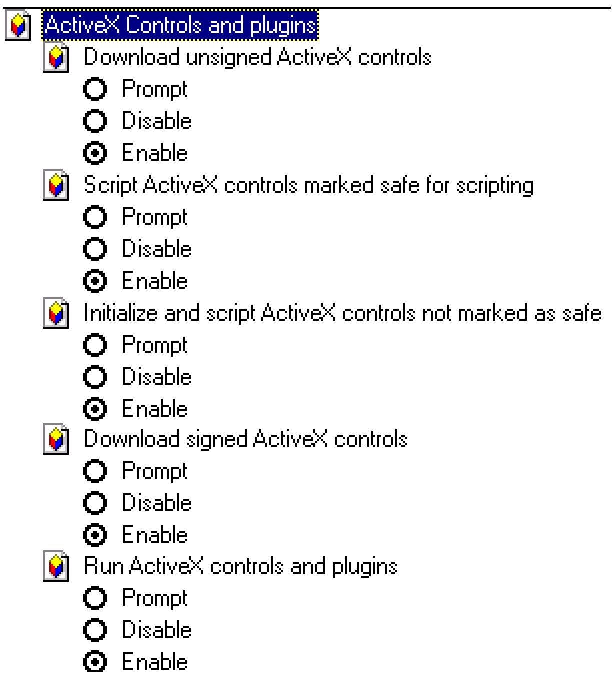


2. A pop-up window will appear with several tabs. **Select** the **Security** tab to view security settings for Internet Explorer.

3. Select **Custom Level**. A settings window will appear.



4. The following security settings must match the settings on your computer used to enter SAMIS data. All five of these Active X settings must be set to **Enable**; no other settings need to be changed. If these Active X settings are not set to Enable, change the security settings on your computer by clicking on the appropriate radio buttons displayed below.

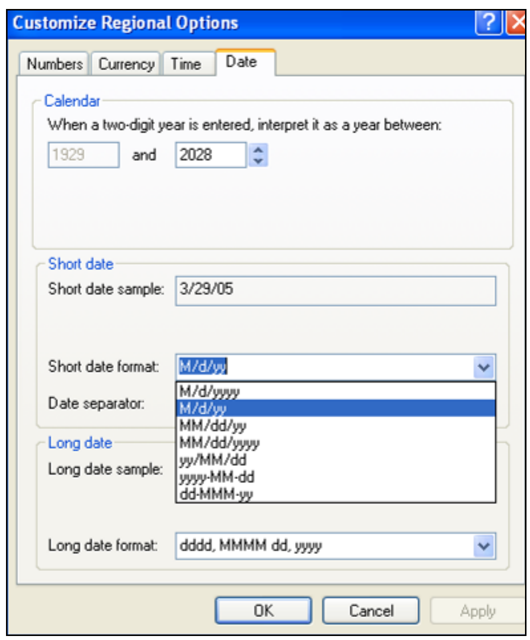


5. Once the five Active X settings are set to Enable, **select OK** .
6. When prompted as to whether you're sure you want to change the security settings, click **Yes**.
7. Click **OK** to close the Internet Options window.

Configuring Regional Settings

1. From the **Start** menu, navigate to **Settings**, then **Control Panel**
2. Then double click the **Regional and Language Options** icon. (You may have to switch to "Classic View" to see the icons.)
3. For Windows XP only, you will see a window like the one below. Click the **Customize** button. For those using other versions of Windows, skip to the next step.

4. A window like the one below will open. Click on the **Date tab**.
5. Select a short date format using the **mm/dd/YY** scheme.
6. Click the **Apply** button, then the **OK** button in the Customize Regional Options window.



7. Click the **OK** button in the Regional and Language Options window to close the window. **Close the Control Panel**.

Chapter 3 - Logging Onto the SAMIS System

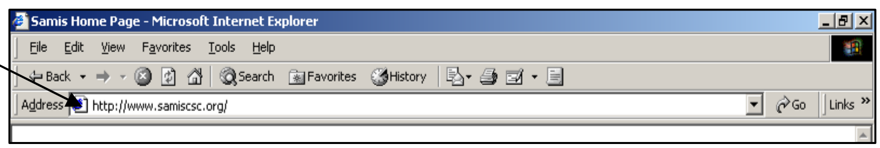
How to Access SAMIS

Once you have received a user name and password from the CSC, you will be able to log onto SAMIS. Follow these steps:

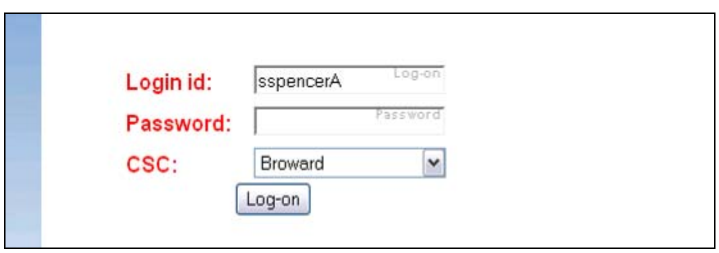
1. From Internet Explorer **type the Address** for SAMIS in the IE Address Bar and select **Enter**. You must choose either the training or production site. All real data should be entered in the production site. The trainings site should only be used for practice. Data can not be moved from the training site to the production site. For site addresses, see the picture below.

SAMIS "Production" Site:
https://www.samiscsc.org

SAMIS "Training" Site:
https://training.samiscsc.org

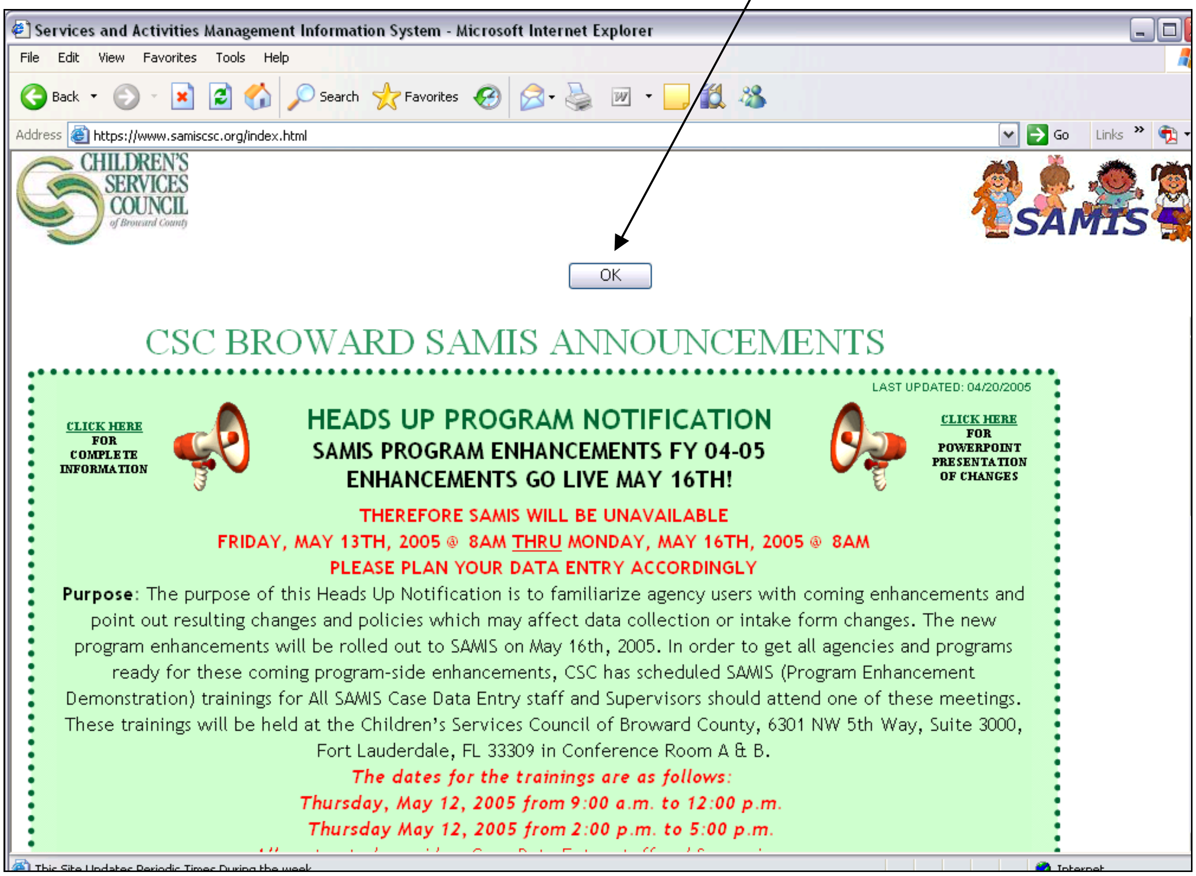


2. Click **Go.** The login page will appear.
3. **Enter** your **userid** and your **password.** *New Users need to contact the SAMIS Helpdesk for UserID and Password information.*
4. **Choose your CSC.**
5. Click **Login**.



6. If you are logging in for the first time, you will be asked to change your password. Enter the password you used to log on as the **old password**, enter your **new password twice**, and click **Save**. Your password is case sensitive and must be at least 5 characters long. Upper case letters, lower case letters, and numbers should be utilized to create a secure password.

7. The County-wide SAMIS Announcements will appear. You may navigate within the announcements to find information, downloads, and training opportunities.
8. When finished browsing the announcements, click **OK** to go to the Main Menu.



How To Log Out

1. Close the Internet Explorer browser, or
2. Navigate to a new Internet site.

SAMIS Main Menu

The main menu will be available once an agency user has successfully logged into SAMIS. The user will only see menu options to which they have access.

Agency Menu Page

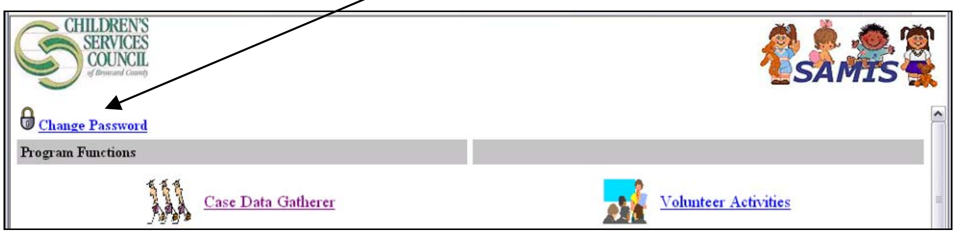
How to Choose a Menu Option

Click on the desired menu option wording or related icon once to navigate to the corresponding screen.

Changing Passwords

New Users – All new users are required to change their password the first time they log into the SAMIS system. After logging in the first time, the users will be brought to the **Change Password** screen.

Existing Users – At any time, users have the ability to change their password. To navigate to the **Change Password** screen, select the **Change Password** hyperlink from the **SAMIS Main Menu** screen. .



Changing the Password

1. Type the old password in the **Old Password** field.
2. Type the new password in the **New Password** field.
3. Re-type the new password in the **Confirm Password** field.

> **TAKE NOTE:** Passwords must be at least 5 characters long and should contain numbers and letters. SAMIS is case sensitive when entering the password. Therefore, it is suggested that you type all passwords in lower case.

4. Select **Save** to save your changes, or Back to return to the Main Menu without saving.

Chapter 4 - SAMIS Quick Tips, Navigation, and Controls

SAMIS Quick Tips

1. **Navigation** - The navigation of SAMIS is based on general Internet navigation controls.

2. **Maximize the screen** each time you log on the system. When SAMIS is not maximized the bottom of the screen including some command buttons will not be viewable.

3. **Time Outs** – SAMIS times out after 20 minutes. It is important to frequently save changes because browser time outs will not save any unsaved work. If you find yourself back at the login screen during a save or request for information, you have timed out and must log in again. To help you manage time outs, a countdown timer at the bottom of each screen will remind you how long you have before the system times you out. Additionally, pop up windows, reminding you to save, will appear at 10 minutes prior to time out and 5 minutes prior to time out.

4. Avoid using the following characters (@ # % & '$). These characters are interpreted as database commands and will perform certain unwanted tasks.

5. Do **NOT** use the Enter key while in SAMIS. (Use the **Tab** key to move from field to field and **Shift Tab** to move backwards).

6. The user only needs to click once on the mouse in SAMIS. (Double clicking is not necessary.)

7. To print any page in SAMIS select **File**, **Print**.

8. All references to FY in this manual apply to the CSC FY (October 1-September 30).

9. Enter dates by typing two digits for the month, two digits for the day and four digits for the year. **NO** slashes are necessary.

10. Once the user has selected an Agency-Program combination from any of the Agency-Program Pick lists in SAMIS (except Attendance Tracking), the same Agency-Program combination will be pre-selected in the Pick lists for that user's session. Once the user exits SAMIS or the session times out, the Agency-Program combination will not be pre-selected upon entering back into the application, hence it is only for the lifetime of the current session.

11. The **Discard Unsaved Changes button** can be used to discard any **unsaved** changes on any of the data entry screens in Case Data Gatherer.

12. **SAMIS Menu Bar** – A menu bar with all available options will appear at the top of each CDG screen.

13. Once you have selected an Agency-Program combination from any of the Agency-Program pick lists in SAMIS (except Attendance Tracking), the same Agency-Program combination will be pre-selected in the pick lists for that user's session. Once the user exits SAMIS or the session times out, the Agency-Program combination will not be pre-selected upon entering back into the application. Hence it is only for the lifetime of the current session.

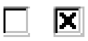
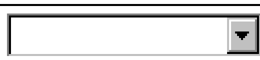
14. **Client Identifier Fields** define which four, participant-related fields are displayed for all participant data pages and reports across a particular program in SAMIS. Individual programs should choose fields wisely to account for both data entry and reporting needs. It is recommended that the CSC Case Code, the Agency Case Code, or the participant name be

included to make cases fully identifiable in reporting and data entry contexts. Possible Client Identifier Fields include, but are not limited to, the following:

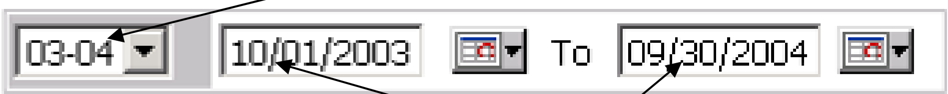
CSC Case Code
Agency Case Code
Date of Birth
Involvement (Primary or Secondary)
Last Name
First Name
Social Security Number
School ID
Case Open Date

Controls

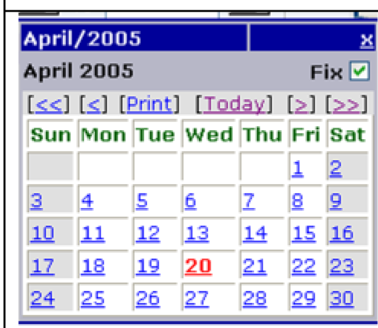
The following items are "controls" that exist within SAMIS. In addition to menu items, controls are items that will get focus by selecting with the mouse.

	**Edit fields** are used to enter (type in) text. These fields will have a description label next to them indicating the type of information to be entered.
	**Check boxes** allow only one of two values: on or off. If the value is on, an "x" displays in the check box. If there are several check boxes in a group, more than one may be "on" at the same time.
	**Radio buttons** are similar to check boxes; however, when a group of buttons is displayed, only one may be selected at a time. The options will toggle; if you select one, the other(s) will be toggled off.
	A "**drop down" or "pick list**" box allows the user to select values from a list. The selected value will be displayed in the box portion of the drop down list box.
	**Command buttons** are used to navigate to other pages or perform specific actions. The label on the button will describe what function it will perform.
	The **SAMIS "Home" link** is used to return to the **SAMIS Main Menu**. This link is available on every screen within the SAMIS application. (It is important to note that this link does **NOT** save.)
569.400	**Hyperlinks** are used to navigate to another page. The hyperlink text will describe what page will be opened. Hyper links in SAMIS are always displayed in Blue.

SAMIS includes a date quick selection tool for searching and reporting functions. The date range for the date quick selection tool is automatically set to the current fiscal year. You may change to any other fiscal year date range or reset the current fiscal year by selecting the appropriate fiscal year from the **fiscal year drop down list.**

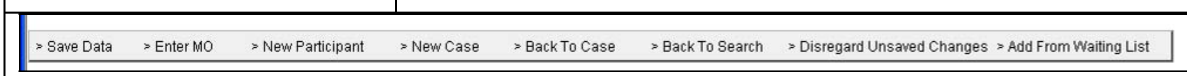


You may then change the actual dates in the **date boxes** to match the date range desired, if it is different that the fiscal year date range. (These dates may be changed by typing a new date into the date boxes or by clicking the calendar button to the right of each date box and selecting the dates.) The **report will run by the date range shown in the date boxes**, regardless of the fiscal year chosen.



The **calendar tool** allows you to select dates from an interactive calendar.

- The calendar defaults to the current month. The current date is always highlighted.
- To move forward or backwards a single month, use the single arrows. (< or >)
- To mover forward or backwards an entire year, use the double arrows. (<< or >>)



Menu bars with all possible options appear on each CDG data entry screen. Click the option you would like from the menu.

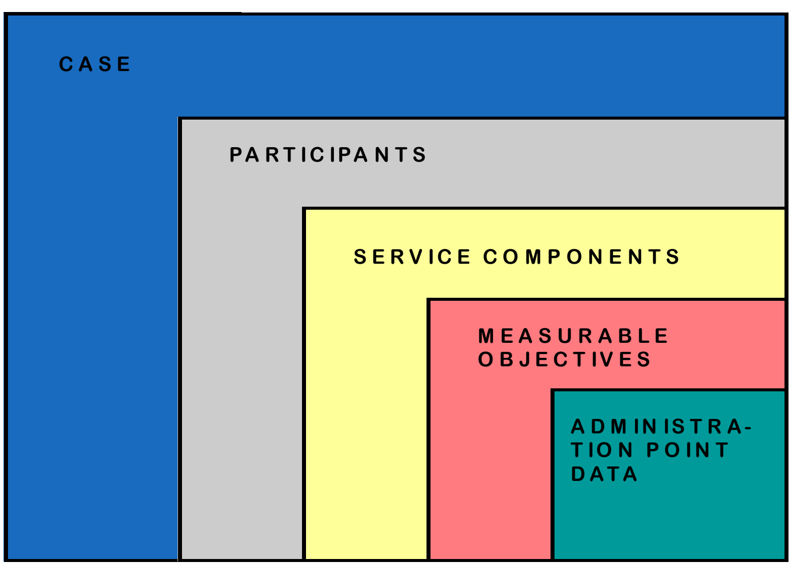
Chapter 5 – CDG Data Entry Workflow

Levels of Information

In the Case Data Gatherer, there are several levels of information to be collected. What follows is a description of each level.

Level Name	Information Collected
Case	Collects household-level information to help better understand the needs of the participants.
Participant(s)	Collects specific information about each participant receiving services as part of the same case.
Service Component(s)	Specifies the type of service that each participant will receive.
Measurable Objective(s)	Appear automatically once the service component is selected. Measurable Objectives contain instructions for the type, delivery, and timeframes of a specific test or assessment.
Administration Point(s)	Contain the test or assessment data that the Measurable Objective specified.

Parts of the Case Data Gatherer



The Lawyer Analogy

To understand the collection and entry of data in the Case Data Gatherer, it helps to compare the process to that of a lawyer preparing for trial. A lawyer starts developing a case by gathering general information and then working towards the specific. That's exactly what you'll be doing in the SAMIS Case Data Gatherer.

Like the lawyer, you will gather some basic information about your case so that you can add details later. You will be entering such general information as the income level, family arrangement, and referral information at the case level.

Once the lawyer has a foundation for his case, he finds the people involved directly with the case and finds out as much pertinent information as possible. The actual people involved in your case will be entered as participants. Here you will enter information such as race, zip code, gender, and reasons for participation to define each participant.

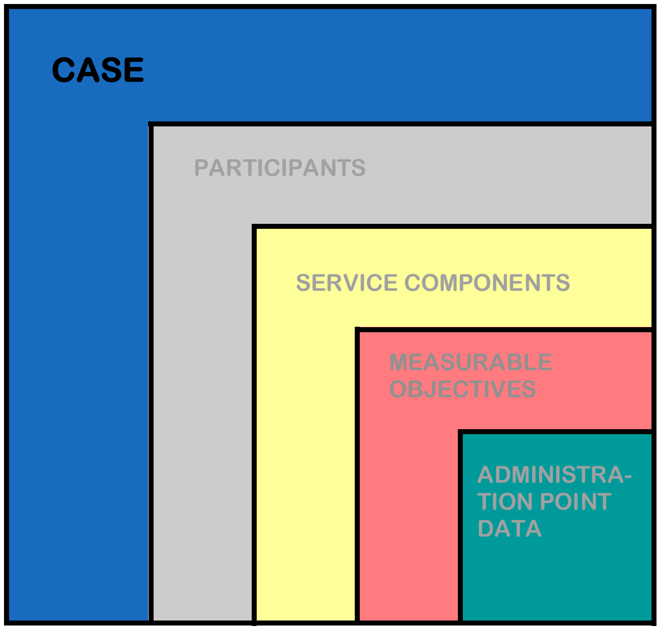
The lawyer cannot stop at this point or he wouldn't win many court cases. Just as the lawyer needs more information to bring his case to court, you need more information to make sure your organization looks good when it's time for funding. At this time, the lawyer looks at the actions of each person involved in his case to find evidence for trial. He must prove every detail of each person's involvement in the case.

You, like our lawyer, will start to prove how each participant is involved in the case. To do this you must include a Service Component; this will tell the kind of service that your participant will have in the program.

Our lawyer will do research and find very specific information on each person in his case to try to prove that person's involvement. He will collect specific evidence based on his research to make his case as perfect as possible. Fortunately for you, once the Service Component is selected, you will have a wonderful thing called a Measurable Objective that tells you how to find the information you need. The information the measurable objective asks for should be put into the Administration Point(s) for each measurable objective.

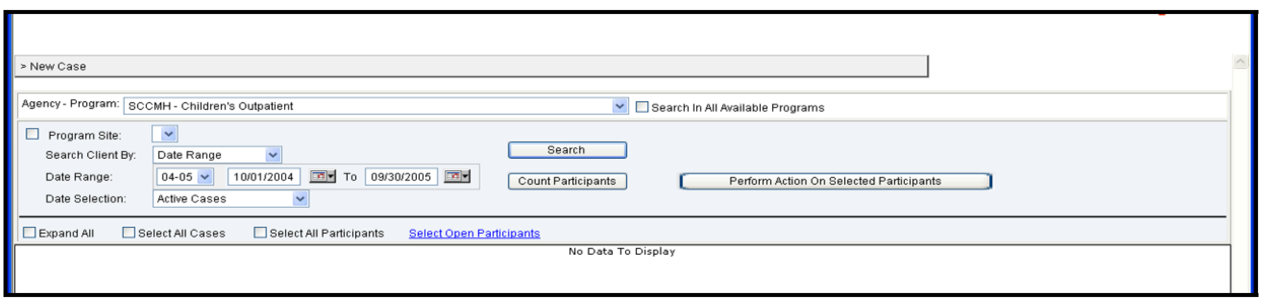
At this point you and our lawyer will have all the information you need to prove your cases. You can use the "Client Level Detail Report" to print all information entered, from the case to the administration point! You can learn how to print this report in Chapter IX. Good luck!

Chapter 6 - Creating A New Case

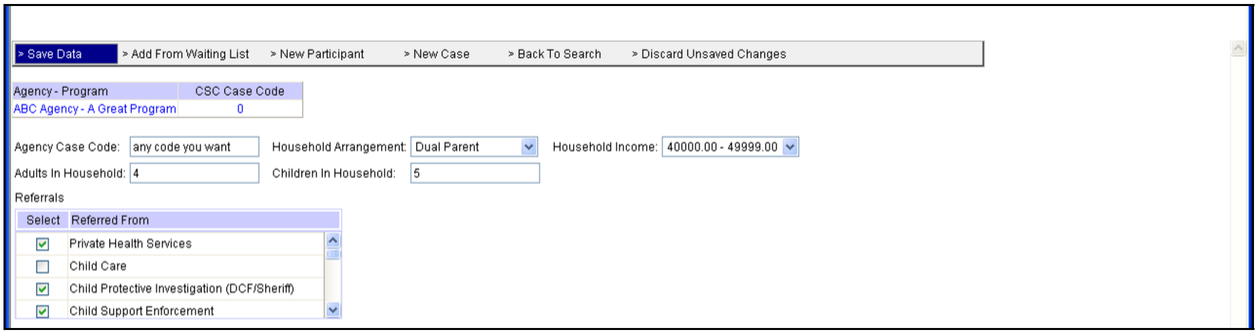


Opening a Case and Entering Case Data

A **Case** must be created before entering **Participants** into SAMIS.



1. From **SAMIS Main Menu** select **Case Data Gatherer**. A screen similar to the one above will open.
2. **Choose the program** in which you wish to create the case from the Agency-Program drop down list.
3. Click **New Case** on the menu bar at the top of the screen. The CDG Case screen will appear.
4. Enter an optional Agency Case Code in the Agency Case Code text box as directed in the provider contract.
5. Enter all other required information using the drop down lists and text boxes provided. Refer to the "Case Screen Fields" chart to understand the required information.



Case Screen Fields

Field Name	Description	Required
CSC Code	Unique code generated by SAMIS for a new case.	SAMIS Generated
Agency Code	Agency Case Code can be any alphanumeric code used by the agency to designate the case.	No
Household Arrangement	The structure of the household. Please see the Household Arrangement section later in this chapter for more extensive information.	Yes
Household Income	The combined income of all household members.	Yes
Referred From Selected Items	One or more referral sources for participants.	Yes
Adults in Household	Total number of adults in the household, regardless of whether they are receiving services.	Not used by CSC Broward
Children in Household	Total number of children in the household, regardless of whether they are receiving services.	Not used by CSC Broward
Number in Household	Total number of people in he household, regardless of whether they are receiving services.	Yes

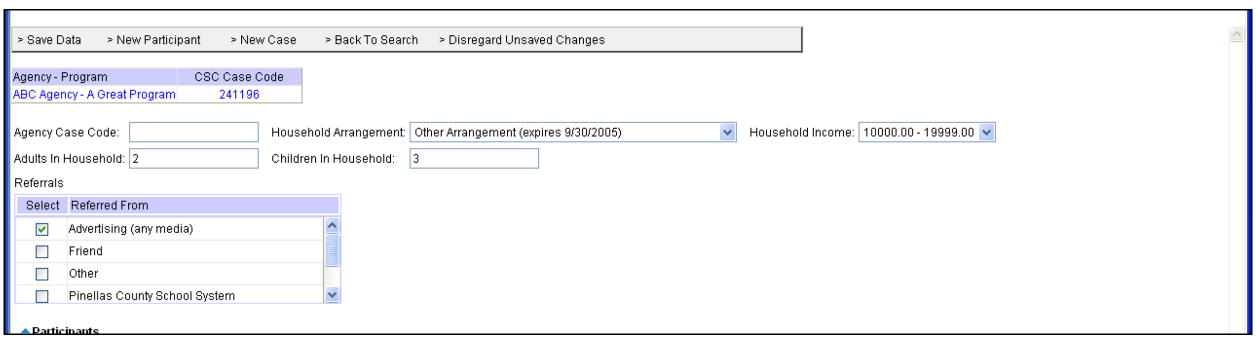
TAKE NOTE:

- The Agency should establish a process for entering the SAMIS **CSC** or **AGENCY Case Code** in the participant paper record.
- SAMIS does not check the Agency Case Code for uniqueness. This means that you could have multiple cases with the same agency case code in SAMIS.
- Opening and closing dates define episodes at the participant level. A case is not closed until all participant episodes in the case have been closed.

Saving the Case

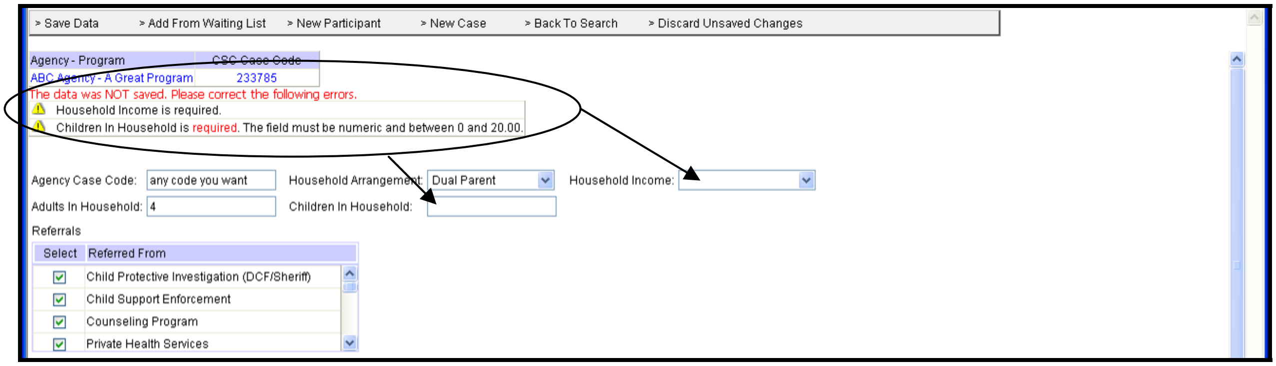
The case must be saved before new Participants can be entered into the case. To save the case:

Click the **Save Data** button on the menu bar at the top of the screen. If the case saves successfully, then a unique CSC Case Code will be created and a message will display indicating a successful save.



Saving Problems

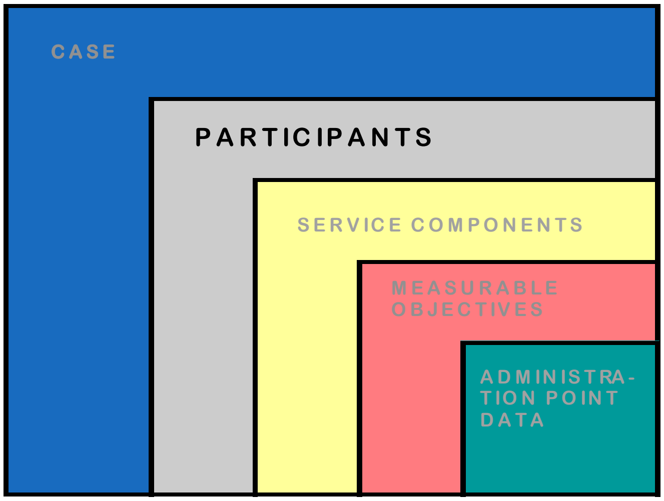
All required fields must be filled in prior to saving the case. If one or more required fields are missing, an error message will appear, stating, **"The data was NOT saved. Please correct the following errors."** The missing fields will be displayed. You should **fix the indicated problems** and **Save Data** again.



Calendar Connection: The Episode Open Date can not be greater than the current date. The Episode Close Date should be after the Episode Open Date for any single episode. Multiple episodes may occur.

Calendar Connection: Episodes should be closed when all service components are closed unless there is a follow up objective.

Chapter 7 - Creating a New Participant



Once the case has been saved, you may add new participants to the case.

Participant Definitions

Participant(s) -A participant is defined as a person receiving face-to-face program services in a CSC funded program. Participants are entered into SAMIS and assigned a unique identifier based on the first initial, last name and date of birth. The unique identifier is stored in the SAMIS database and but does not appear on any screen viewed by the users. Participants can only be retrieved from SAMIS with the CSC or Agency Case Code.

Primary Participant - The person(s) for whom the program is designed, is the main focus of program services, and is expected to receive the most benefits from program participation. All services must be face-to-face. All primary participants must have an objective.

Scenario – Two adults receiving marital therapy. Both adults are the primary if the case plan is directed at addressing behaviors of both individuals. The children of the couple would be considered secondary if they received some face-to-face services.

Secondary Participant - The person(s) who receives services in support of/conjunction with the primary participant. The secondary participant is expected to participate in some, but not all services/activities. All services must be face-to-face.

Scenario – A child receives day treatment services and the parents and other family members attend 1-2 family sessions. The family would be secondary participants. The diagnosis/assessment and focus of the treatment is on the child receiving day treatment services.

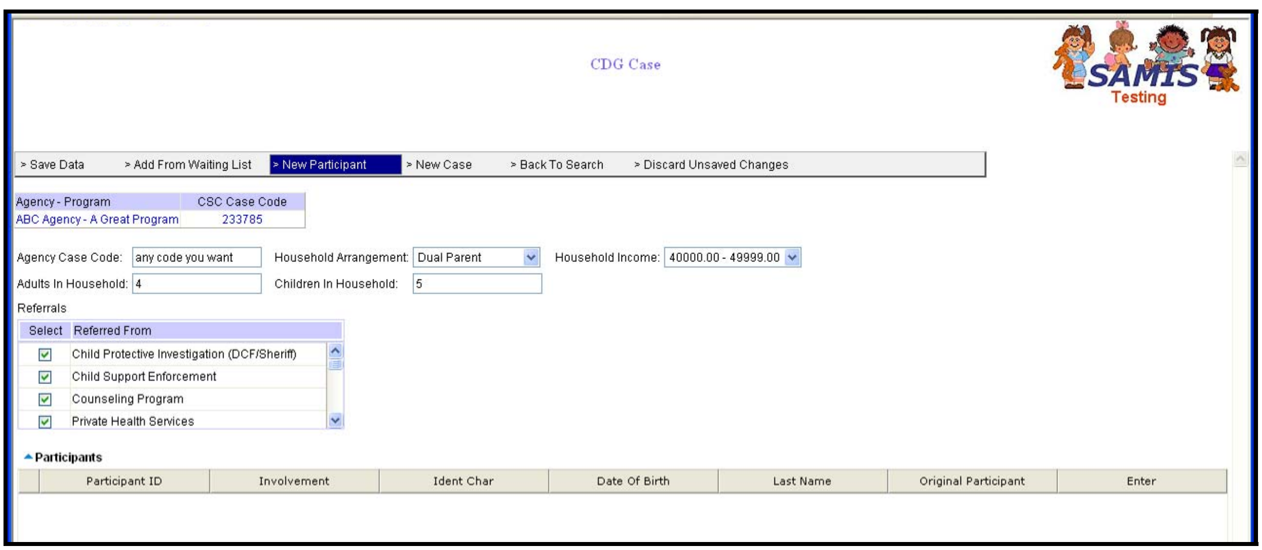
Episode – Each new participant opened in a case is considered to have begun an episode of service. Individual participants have episode open dates and episode close dates. The case remains active as long as one primary or secondary participant in that case continues to receive services (remains open). When a closed participant in an active case returns for services, that participant will receive a new "episode", with a new open date. The participant returning in a new episode can then continue with the MO's assigned previously or be assigned completely new MOs (with any old MOs archived). Once all episodes for all participants in a given case have closed, the entire case will be considered closed as well. In cases where all participants are closed, a new case should be created for household members who return for services.

Adding the Participant

There are two ways to add participants to a case. If you have just entered and saved the case, it is best to add the participant directly from the CDG Case screen. Otherwise, you should add the participant to the case from the CDG Search Screen.

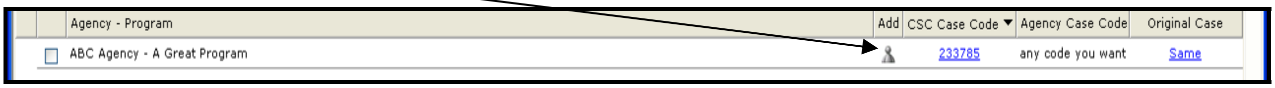
Adding the Participant from the CDG Case Screen

Once you have saved the case successfully, click the **New Participant button** on the menu bar at the top of the case screen.



Adding the Participant to the Case from the CDG Search Screen

1. Search for the case to which you would like to add the participant. For information on searching for cases, refer to the "Searching for CDG Data" chapter.
2. ***Click the New Participant Icon*** next to the case.



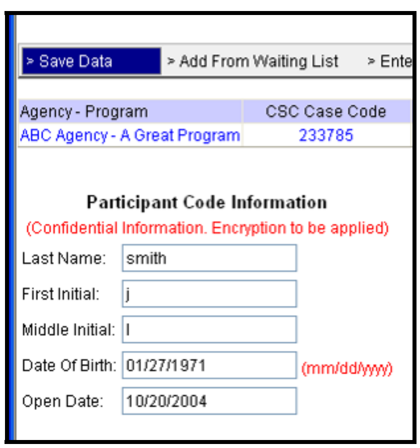
3. For CSC Broward, only one participant is assigned to one case.

Entering Participant Code Information

Once you have chosen to add a participant to the case, you will then be brought to the Participant Code Information screen. This is the screen where the participant's name and birth date are turned into an encrypted code for confidentiality.

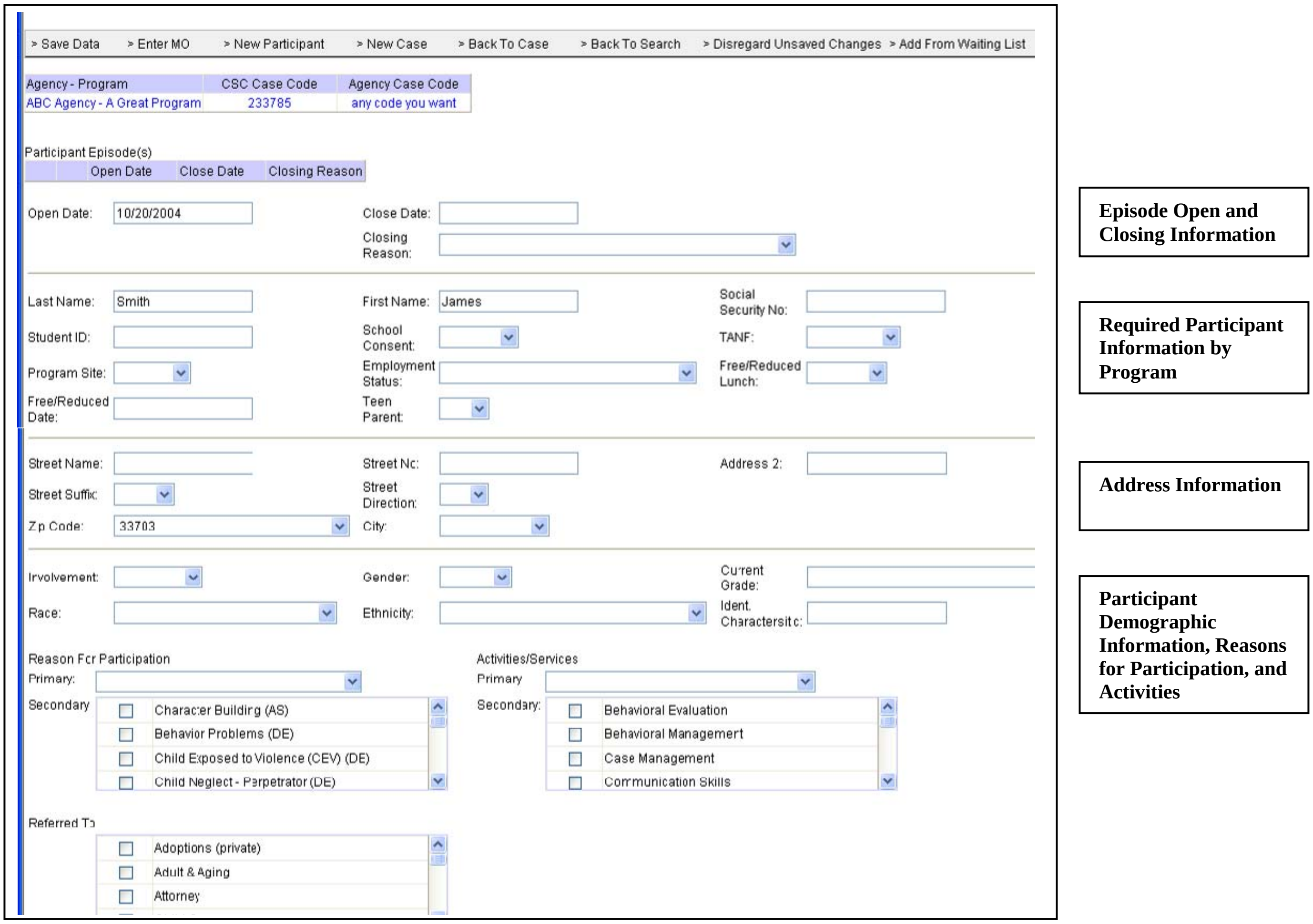
To enter the Participant Code Information, follow these steps:

1. Enter the **Last Name**, **First Name**, and **Middle Initial** (Optional) in the appropriate text boxes.
2. Enter the birth date of the participant in the **Date of Birth date box**.
3. Enter the date the participant began receiving face to face services in the **Open Date date box**.
4. Click the **Save Data button** on the menu bar at the top of the screen. You will be brought to the Participant screen.



Entering the Participant Demographic Data

On the Participant Screen, the participant demographic information appears in four different sections. The first section that you will see at the top contains the episode open date, episode close date, and episode closing reason. The second section shows information specifically required for programs on a program by program basis. You will only see what you need to fill in. Note that Social Security Numbers appear for all programs, regardless of whether they are required by CSC or not. The third section contains city, zip code, and other address information. Only required fields will appear. The fourth section displays demographics, reasons for participation, and activities.



* All fields are displayed in this image. CSC of Broward requires entry into specific fields only. Fields which are never collected will not appear.

Participant Screen Rules

CDG Participant Screen Field	Data Entry Procedure	Does CSC Use This Field?
Episode Opening and Closing Information		
Episode Open Date	Enter the first day the participant received services in an episode into the date box.	Yes
Episode Closing Date	Enter the last day the participant received services in an episode into the date box.	Yes
Episode Closing Reason	Select the reason the episode closed from the pick list.	Yes
Required Participant Information by Program		
Last Name	Type the last name of the participant into the text box. This box should be automatically filled in, based on the participant code information.	Yes
First Name	Type the first name of the participant into the text box. This box should be automatically filled in, based on the participant code information.	Yes
Social Security Number	Enter the social security number of the participant into the text boxes. These boxes will automatically tab to the next box.	Yes, but some agencies will enter unique id number instead the SSNs.
Student ID	Type the Student ID of the participant into the text box.	Not at this time
School Data Consent	If a School Data Consent Form has been received from the parent of guardian, indicate whether the parent agreed or did not agree to the consent by selecting the response from the pick list.	Not at this time

TANF Eligible	Select whether the participant is eligible for TANF.	Yes
Employment Status	Select the employment status of the participant from the drop down list.	No
Free Reduced Lunch	Select the appropriate Free and Reduced Lunch status form the pick list.	No
Free Reduced Lunch Date	Enter the date associated with the Free and Reduced Lunch status in the date box.	No
Teen Parent	Select whether or not the participant is a teen parent from the pick list options.	No
Program Site	Select the physical site at which the participant receives services from the pick list options.	No
Address Information		
Street Number	Enter the street number into the text box.	No
Street Name	Enter the street name into the text box.	No
Address 2	Enter additional address information such as "Apartment Number" into this text box.	No
Street Suffix	Choose the appropriate street suffix (St., Ave., Dr., etc.) from the pick list.	No
Street Direction	Choose the appropriate street direction from the pick list.	No
Zip Code	Enter the participant zip code by choosing the right zip code from the pick list.	Yes
City	When the zip code is populated, the city should automatically appear. If more than one city is served by a particular zip code, choose the appropriate city from the pick list.	Yes
Participant Demographic Information, Reasons for Participation, and Activities		
Involvement	Select whether the participant is primary or secondary participant from the pick list.	Yes
Gender	Indicate whether the participant is male or female using the pick list.	Yes
Race	Choose the participant's race from the pick list.	Yes

Ethnicity	Select the Hispanic ethnicity of the participant from the pick list.	Yes
Current Grade	Select the highest level of education that the participant has received from the pick list.	Yes
Identifying Characteristic	There are two possible purposes for this field: • Enter a generic identifier for twins, triplets, etc. ("Twin A", "Twin B") into the text box. • Enter any identifying number or other information specific to the participant.	Yes, but agencies are not required to fill this field in unless there is a specific reason.
Primary Reason for Participation	Choose the reason for participation for the participant which most closely matches your program methodology using the selection list.	Yes
Secondary Reason(s) for Participation	Choose one or multiple secondary reasons for participation for the participant which most closely match your program methodology using the check box list.	Yes, but agencies are not required to have a secondary reason.
Primary Activity	Choose the primary activity for the participant which most closely matches your program methodology using the selection list.	Yes
Secondary Activity	Choose one or multiple secondary activities for the participant which most closely match your program methodology using the check box list.	Yes, but agencies are not may not have a secondary activity.
Referred To	Choose the types of referrals offered to the participant during or at the conclusion of services from the check box list.	Yes, but agencies are not required to have a Referred To.

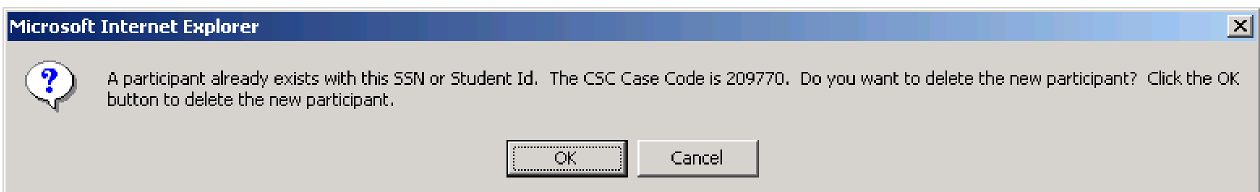
TAKE NOTE: The fields displayed to identify a participant on the participant list are customized to each program. Not all programs collect the same level of participant identifying information such as name and SS#. To change the displayed participant identifying fields for your program you must notify the SAMIS Helpdesk.

TAKE NOTE: If the activities or reasons for participation listed are utilized frequently, contact the SAMIS Help Desk for assistance.

Check for Duplicate Participants

Upon saving a participant, SAMIS will perform a system check to ensure that duplicate participants are not added to open cases within the same program simultaneously. The system will utilize the Social Security Number and/or the Student ID. If these fields are not utilized SAMIS will not perform a check for duplicate participants. If a match is found, the system will not allow for two participants in open case within the same program to have the same SS# and Student ID.

New Participants: If a new participant is being added and upon saving SAMIS finds a matching social security number and/or student ID in another case that is open, the following screen will display. The user will have the ability to select OK and delete the newly added participant or select cancel to edit the matching information so it no longer matches.



Existing Participants: For existing participants when edits are made, the system will check upon saving to see if there are other participants in open cases that having matching social security number and/or student ID. If a match is found, the following screen will display. The user will only have the ability to edit the matching information so it no longer matches.

Chapter 8 – Client Waiting List

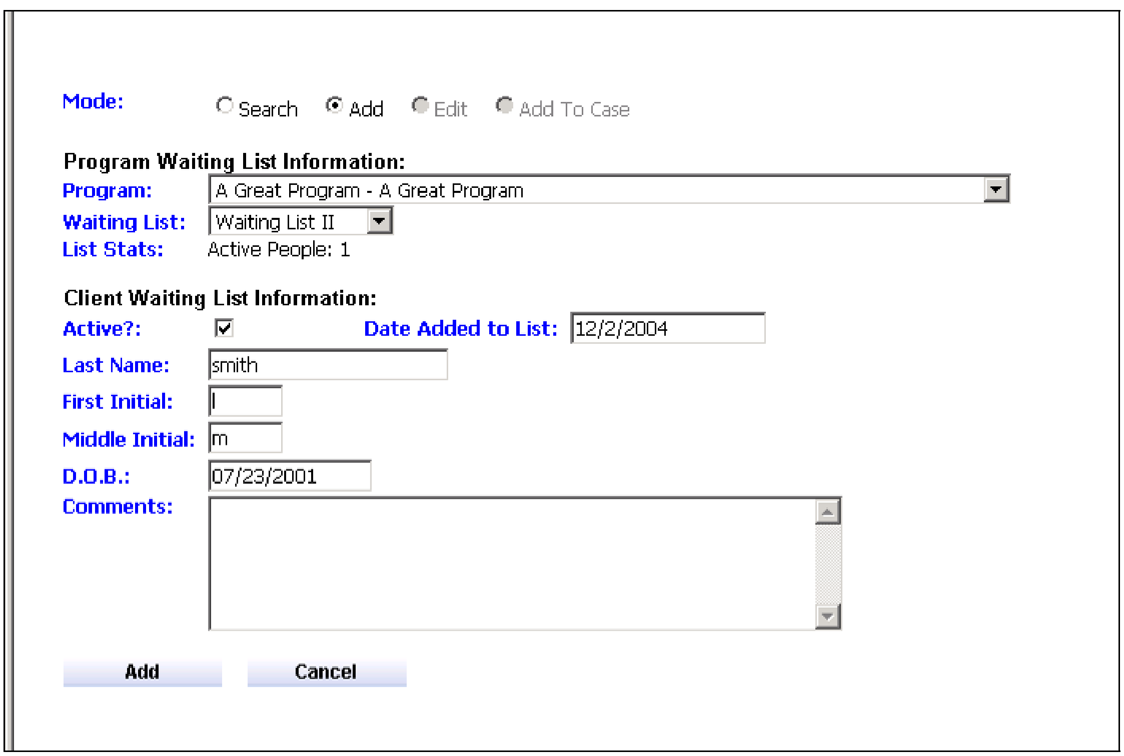
"This Client Waiting List Module is not be used by the Children's Services Council of Broward County"

The Client Waiting List module allows programs with participant waiting lists for specific services to manage and track the demand for those services relative to program capacity. Participants can be added to a waiting list, removed from a waiting list with a noted reason, and added to a case while being removed automatically from the waiting list.

Adding Participants to the Waiting List

This function is used to add participants to an appropriate waiting list for the program. To add a participant to the waiting list, follow these instructions.

1. From the SAMIS Main Menu, click on **Client Waiting List** under the Program Functions section.
2. Under Mode, select the **Add** radio button. The screen will adjust.
3. Select the appropriate program from the **Program** drop-down list.
4. Select the appropriate waiting list from the **Waiting List** drop-down list.
5. Enter a new date into the Date Added to List text box, if the current date is not applicable.
6. Enter the **Last Name**, **First Initial**, **Middle Initial**, and **D.O.B**. for the participant in the appropriate text boxes.
7. Enter any comments you feel necessary. You do not have to enter comments.
8. Click the **Add** button. The participant will be added to the waiting list.



Searching for Participants on Waiting Lists

1. From the SAMIS Main Menu, click on **Client Waiting List** under the Program Functions section.
2. Under Mode, select the **Search** radio button.
3. Select the appropriate program from the **Program** drop-down list.
4. Select the appropriate waiting list from the **Waiting List** drop-down list.

Field	What do you want to do?	How to Search
Waiting List Drop-down List.*	Search for participants on a specific client waiting list for the selected program	Select the **appropriate waiting list** from the Waiting List drop-down list.
	Search for participants on all client waiting lists for the selected program	Select the **All Waiting Lists** from the Waiting List drop-down list.

5. Search for active or inactive participants.

Field	What do you want to do?	How to Search
Active Check Box*	Find active participants on the selected waiting list	**Check the Active check box.**
	Find inactive participants on the selected waiting list	**Uncheck the Active check box.**

6. Choose the search parameters for particular participants. You may search by a single criterion or search by multiple criteria using some, all, or none of the following fields: Last Name text box, First Name text box, Middle Initial text box, and D.O.B. text box. The table below will help you.

Field	What do you want to do?	How to Search
Last Name Text Box First Initial Text Box Middle Initial Text Box D.O.B. Text Box	Search for specific people by Last Name, First Initial, Middle Initial, and/or Date of Birth.	**Enter the particular information** for which you are searching. For example, if the last name were Smith, you would enter "Smith" in the Last Name text box.
	Don't search for specific people; give me everyone.	**Leave all fields blank.**

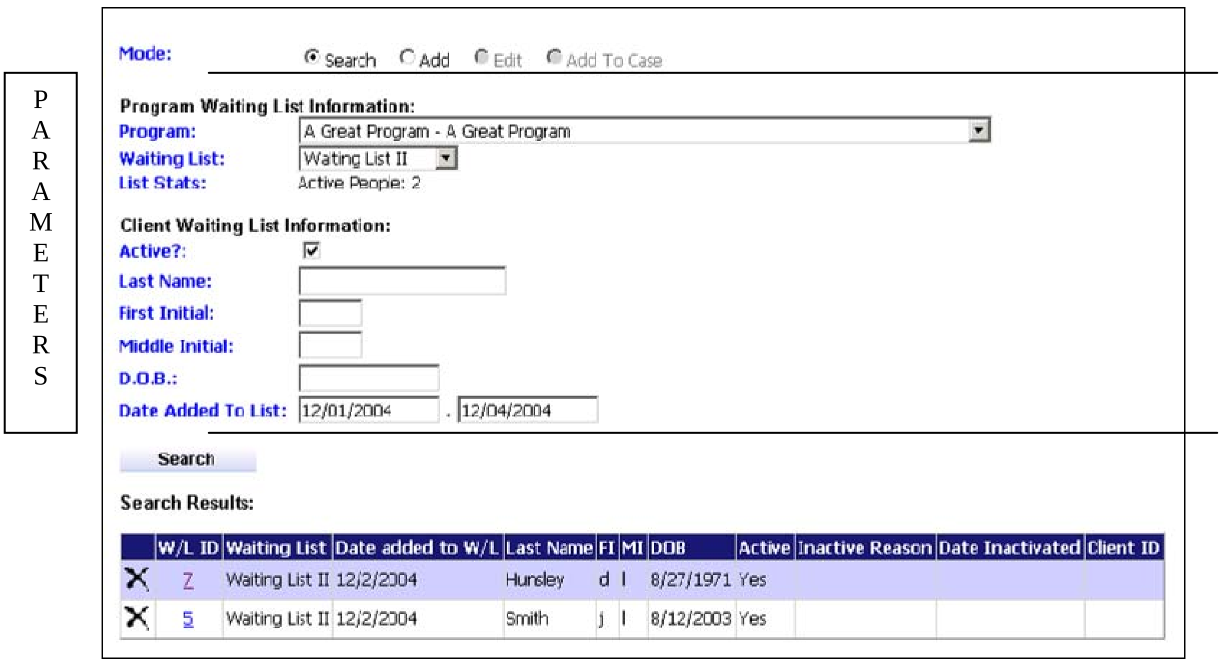
Note: The more criteria you choose, the more narrow your search results will be. For example, if you type "Jones" into the Last Name text box, you will only get participants with the last name of Jones. Participants with other last names will not be displayed. Leaving a field blank will display all valid results from that field. For example, leaving the Last Name text box blank will give you all last names.

7. Choose an appropriate date range for your search.

Field	What do you want to do?	How to Search
Date Added to List Text Boxes	Search for participants added during a particular date range	**Enter a from and to date** in the Date Added To List text boxes.
	Search for participants for all time.	**Do not enter information into the Date Added To List text boxes.**

8. Click the **Search** button. A list of participants will be displayed.

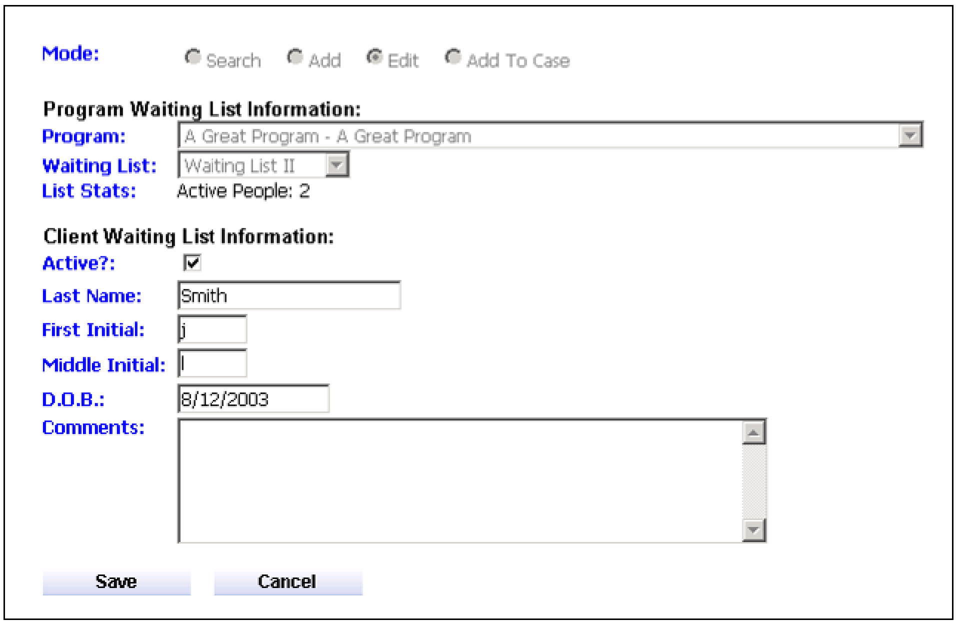
*Indicates fields for which a choice must be made. These fields cannot be left blank.



Editing Participant Information in Waiting Lists

To edit information for participants on the waiting list, follow these steps.

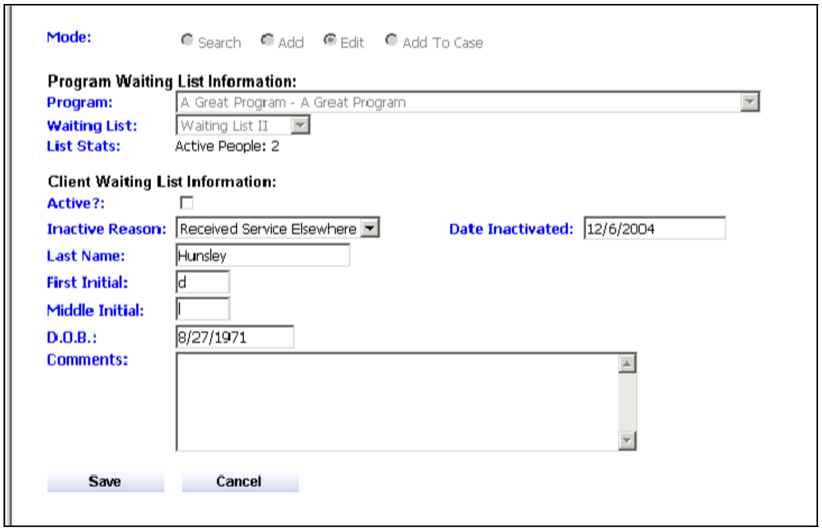
1. **Search for the participant** using the steps described in "Searching for Participants on Waiting Lists".
2. **Click the hyperlink under the W/L ID column** next to the participant to which you wish to make changes. The information particular to that participant will appear.
3. **Change the information** as necessary.
4. Click **Save**.



Inactivating Participants on Waiting Lists

If a participant who belongs on the waiting list leaves before being serviced, you should inactivate the participant. To inactivate a participant follow these steps:

1. **Search for the participant** using the steps described in "Searching for Participants on Waiting Lists".
2. **Click the hyperlink under the W/L ID column** next to the participant to which you wish to inactivate. The information particular to that participant will appear.
3. **Uncheck the Active check box.** An Inactive Reason drop-down list will appear.
4. **Choose the appropriate inactive reason** from the Inactive Reason drop-down list.
5. **Enter an inactive date** in the Date Inactivated text box. The system will automatically put in the current date.
6. Click **Save**.



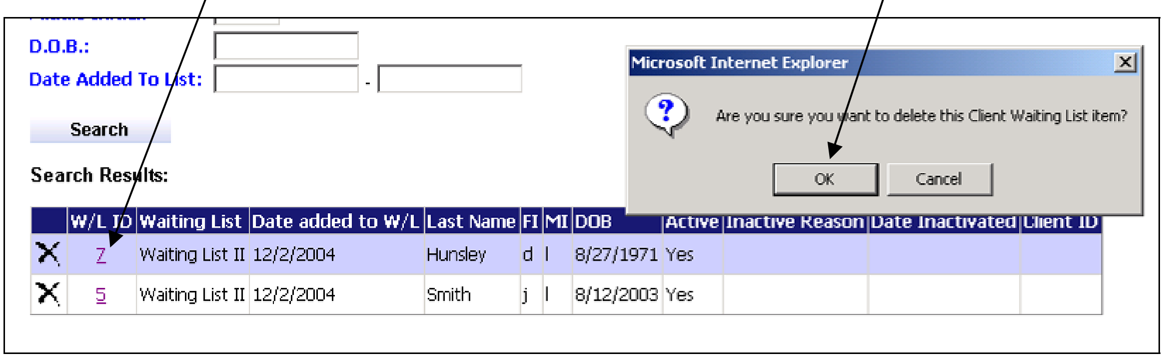
Please Note:

Once inactivated, participants can be viewed, but cannot be reactivated. If the participant is inactivated and then returns to the program, the participant must be added to the waiting list again.

Deleting Participants from the Waiting Lists

If a participant is placed on a waiting list in error, you may delete the participant from the list completely. To delete a participant from the waiting list, follow these steps:

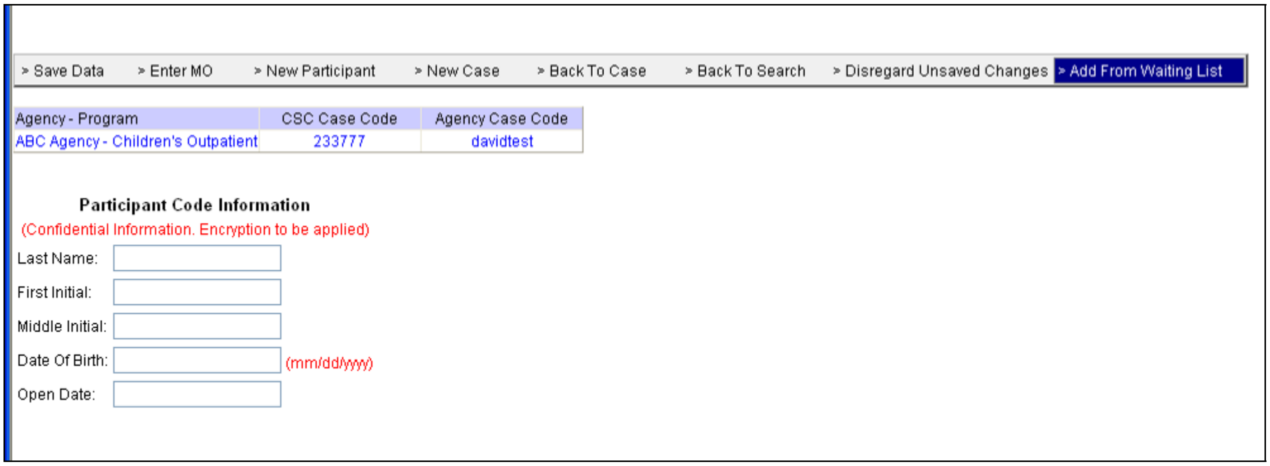
1. **Search for the participant** using the steps described in "Searching for Participants on Waiting Lists".
2. **Click the X next to the participant** you wish to delete. A pop up box like to one below will appear.



3. **Click OK** to delete or Cancel to not delete.

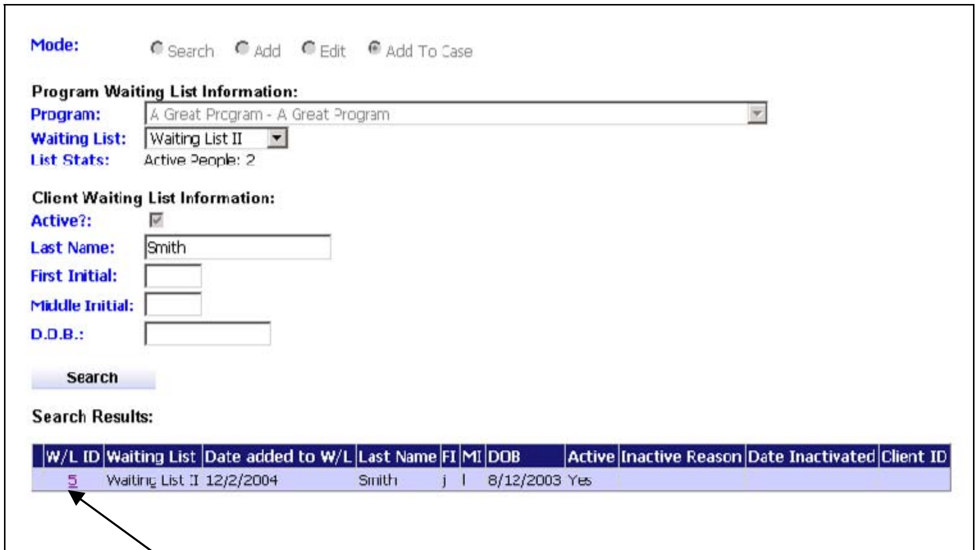
Adding Participants from Waiting Lists to a Case

To add a participant from a waiting list to a case in SAMIS follow these instructions.

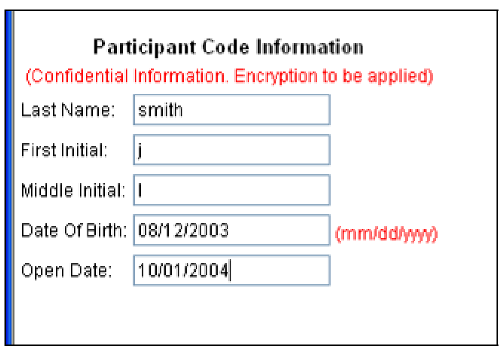


1. From the Participant Code Information Screen, click the **Add From Waiting List** button.

2. **Search for the participant** using the steps described in "Searching for Participants on Waiting Lists".



3. **Click the hyperlink under the W/L ID column** next to the participant to whom you wish to add to the case. The last name, first initial, middle initial, and date of birth of the participant to be added will appear in the Participant Code Information Section of the Add New Participant screen.



4. **Click Save.** The participant will be added to the case and removed from the waiting list. Enter the participant demographic information as described in the "Entering Case Participant Information" sections of the previous chapter.

Chapter 9 - Adding Service Components and Measurable Objectives to a Participant

"This ASC/MO Module is not being used by the Children's Services Council of Broward County"

Once you have created a case and added participants to that case, you should be sure to add a service component to each primary participant. Once the service component has been added, the measurable objectives for that service component and the administration points for all the measurable objectives will appear.

There are two ways to enter service component and subsequent measurable objective information into SAMIS: on an individual case/participant basis or through Measurable Objective Quick Entry.

Entering utilizing individual case/participants: Using CDG, you can add MO information to a participant from the CDG Participant Screen or from the CDG Search Results. After accessing the MO screens, you must select a service component. A service component describes the type of services being measured. By selecting an appropriate service component, the associated measurable objectives will automatically appear.

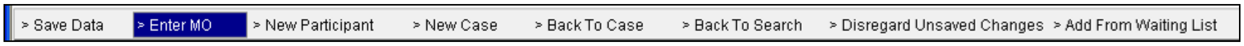
Utilizing Measurable Objective Quick Entry: The user receives a list of participants based on search criteria and can quickly enter data for all participants listed. This entry requires the user to have access to the Measurable Objective Quick Entry module.

Key Terms appearing on the Measurable Objective Screens

Administration Point – the date or dates when the outcome was assessed or measured.
Correct Responses – the number of correct responses the Participant received on a test or survey.
Frequency – the frequency with which an individual participant in a service component. For example, an individual might participate five days per month in parenting training or four hours per week in family counseling.
Measurable Objective – a written statement that describes something that is to be measured and achieved to determine the effectiveness of a program.
Responses – the information or data collected for a participant as stated in a measurable objective. Responses can be the items on a questionnaire or survey, or a variety of other types of information.
Service Components– categories of service and/or activities offered by a program. For example, Program A may offer the components of counseling and Referral. A program's service components are identified and defined in the Program Methodology (Part 1 of the Program Narrative).
Variable – the construct or topic to be measured.

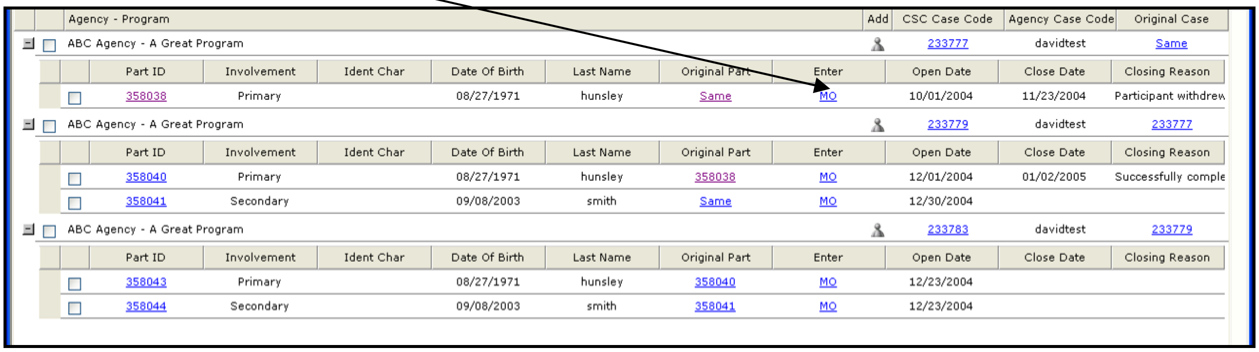
Accessing MOs from the CDG Participant Screen

From the CDG Participant Screen, for a particular participant, click the **Enter MO** button on the menu bar at the top of the screen.



Accessing MOs from the CDG Search Results

1. Once you have searched for the case, expand the case so that you can see the full information.
2. Click the **MO hyperlink** next to the appropriate participant.



Agency - Program	Add	CSC Case Code	Agency Case Code	Original Case
ABC Agency - A Great Program		233777	davidtest	Same

Part ID	Involvement	Ident Char	Date Of Birth	Last Name	Original Part	Enter	Open Date	Close Date	Closing Reason
358038	Primary		08/27/1971	hunsley	Same	MO	10/01/2004	11/23/2004	Participant withdrew

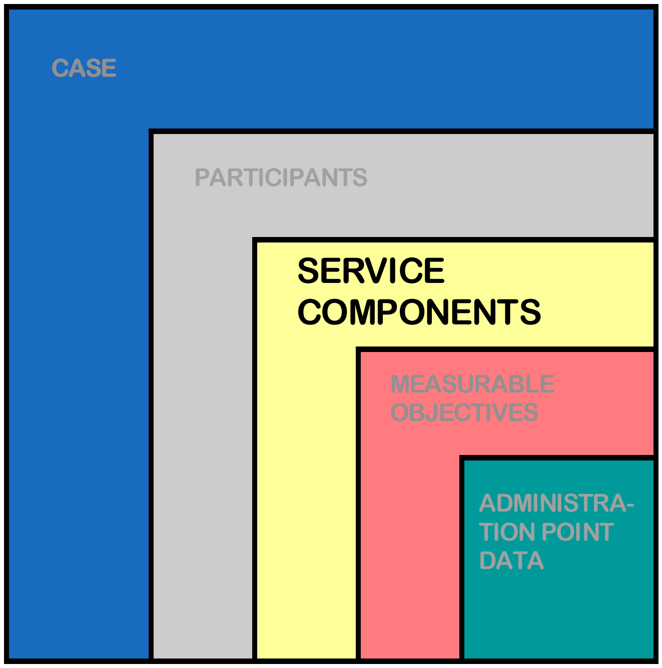
Agency - Program	Add	CSC Case Code	Agency Case Code	Original Case
ABC Agency - A Great Program		233779	davidtest	233777

Part ID	Involvement	Ident Char	Date Of Birth	Last Name	Original Part	Enter	Open Date	Close Date	Closing Reason
358040	Primary		08/27/1971	hunsley	358038	MO	12/01/2004	01/02/2005	Successfully comple
358041	Secondary		09/08/2003	smith	Same	MO	12/30/2004		

Agency - Program	Add	CSC Case Code	Agency Case Code	Original Case
ABC Agency - A Great Program		233783	davidtest	233779

Part ID	Involvement	Ident Char	Date Of Birth	Last Name	Original Part	Enter	Open Date	Close Date	Closing Reason
358043	Primary		08/27/1971	hunsley	358040	MO	12/23/2004		
358044	Secondary		09/08/2003	smith	358041	MO	12/23/2004		

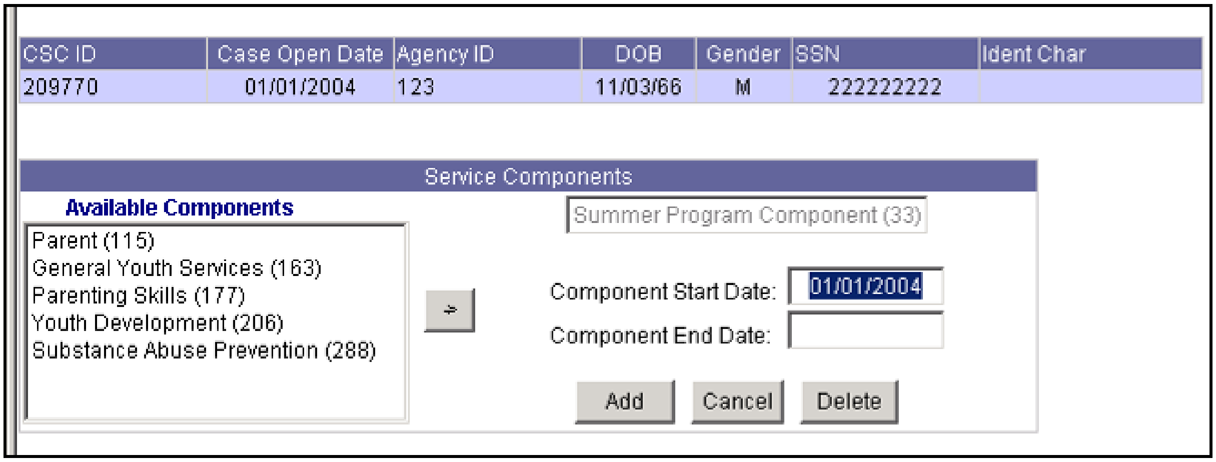
Adding the Service Component



Next you must choose the service component. Some programs have one service component, which is often named "General". Other programs have two or more service components. You should choose the component or components that most closely match the services that the participant is about to receive.

1. You can select the component by clicking on the **component** and then clicking the **arrow** or double clicking the component. Notice that this page has a header showing specific information about the case and participant to which you are adding the component.

2. You will see the following screen. Enter a component start date equal to or greater than the **first episode open date** in the following format: **MM/DD/YYYY**. The default value for the component start date is the episode open date.
3. Then select **Add**.



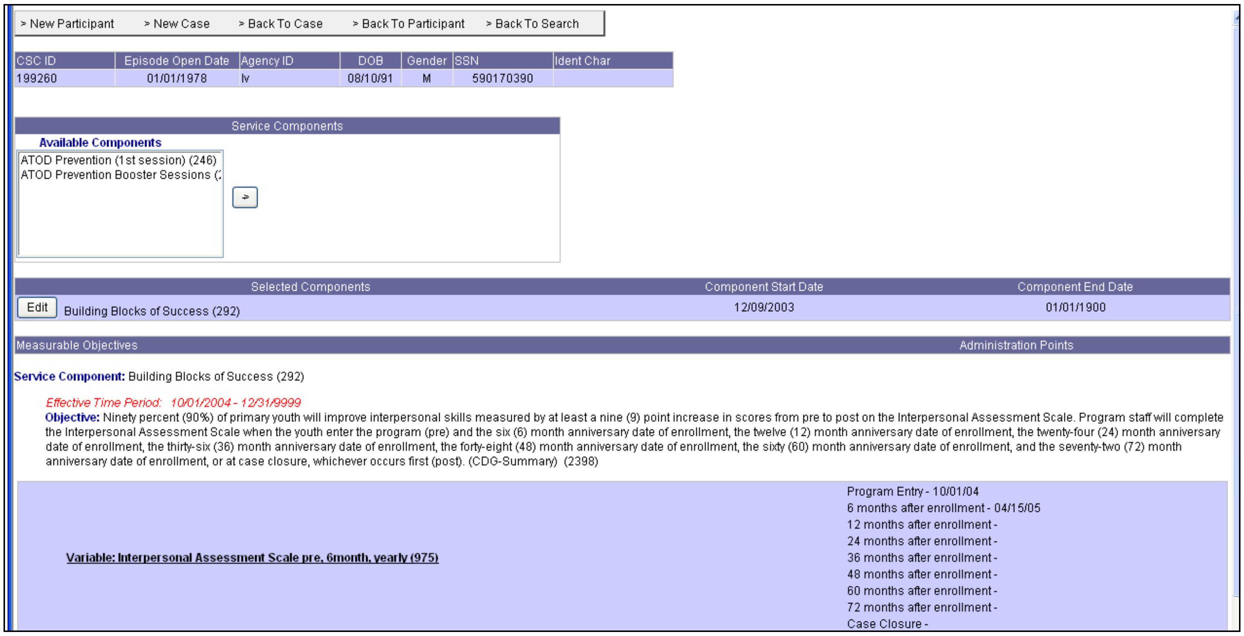
Calendar Connection:

Each Service Component Start Date should be equal to or after the Case Opening Date. No exceptions.

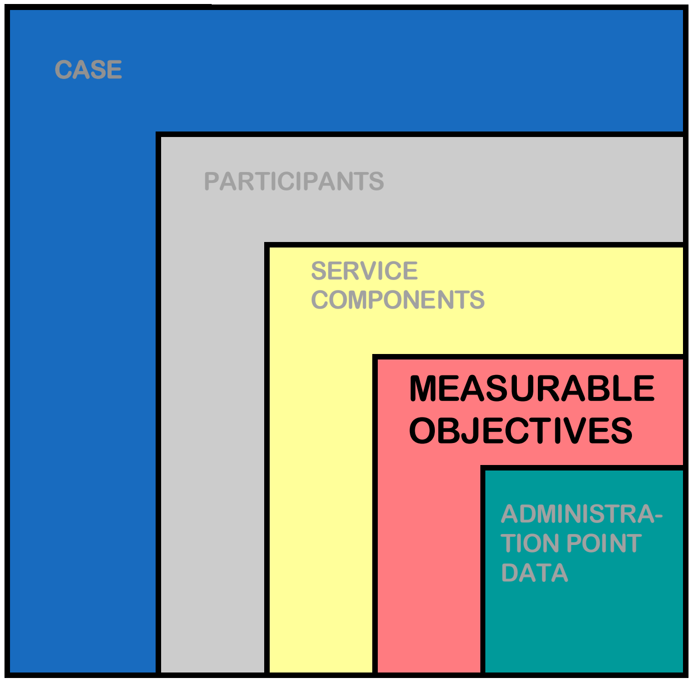
TAKE NOTE:

The service components are attached to specific objectives. All objectives have been negotiated between the CSC and the Program.

Once you have selected the service component, all of the objectives that are associated with the added service component will drop down and your screen should look something like the one below. There may be more than one.



Measurable Objectives



Measurable Objectives appear automatically once the service component is selected. Your most important task at this point is to understand what information, assessments, etc. you will need to satisfy that measurable objective. What follows is an overview of measurable objectives and their uses.

A **Measurable Objective** is a written statement that describes something that is to be measured or achieved to determine the effectiveness of a program. All measurable objectives for the CSC are developed through a process of negotiation between agency staff, a CSC Contract Manager, and a CSC Research Consultant.

TAKE NOTE: Only Individual Objectives will be entered into this module of SAMIS**.** Group and Process level outcomes are entered in another module in SAMIS.

Uses of Measurable Objective Information

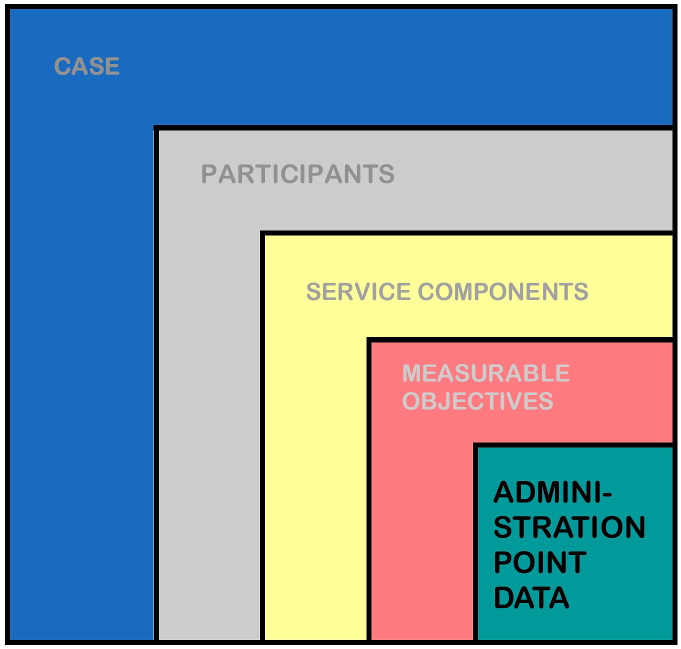
There are several uses for the measurable objective data collected by the CSC including:

- To evaluate a program's effectiveness
- To determine the impact a program has on its consumer
- To improve program services
- To analyze effectiveness of programs and agencies at the county level

The Measurable Objective Process

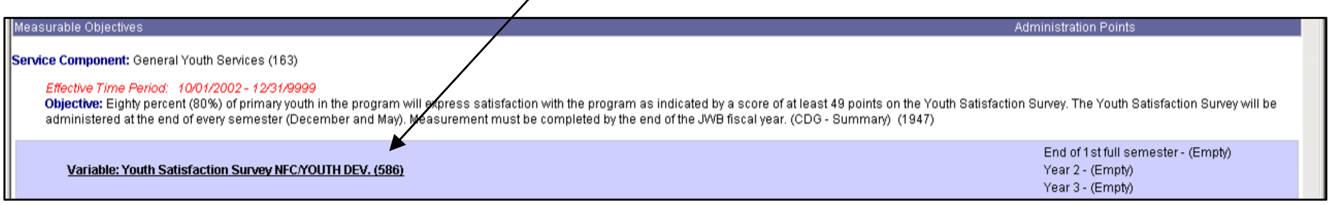
Task	Responsibility
Negotiate Objectives - All measurable objectives for the CSC are developed through a process of negotiation between agency staff, a CSC Contract Manager, and a CSC Research Consultant.	**CSC and Agency**
Objectives are assigned to Agencies/Programs in SAMIS	**CSC**
Assign objective to Participant – The Program assigns the relevant service Component(s) to each participant	**Agency/Program**
Enter results into SAMIS – enter the results.	**Agency**

Entering Administration Point Data



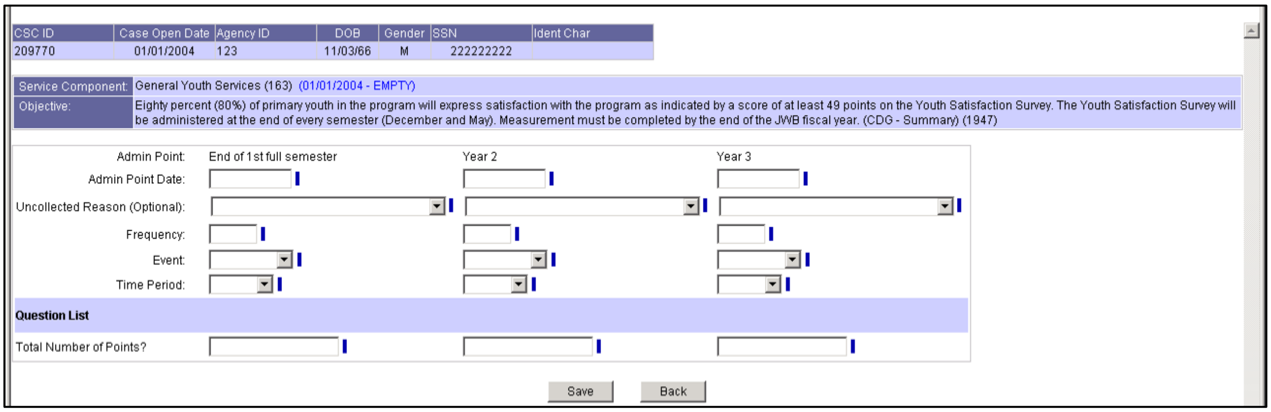
When you initially create a case, add participants to that case, and select service components for each participant, you should collect and enter any data that the measurable objective calls for at the beginning of service to the participant into the appropriate administration point.

Each Measurable Objective will have one or more Administration Points. These Administration Points are accessible by clicking on the **variable hyperlink** under each measurable objective.



This will take you to the Measurable Objective Data Entry Page. This page shows will show as many administration points as can fit on the screen. To view all the administration points for an objective, use the scroll bar to scroll to the right. For administration points with multiple questions, if needed use the scroll bar to scroll down and view all questions.

1. Enter the date that the information for the administration point was collected into the **Administration Point Date text box**. For example, if you were entering a pre test, you would enter the actual date the participant took the test.

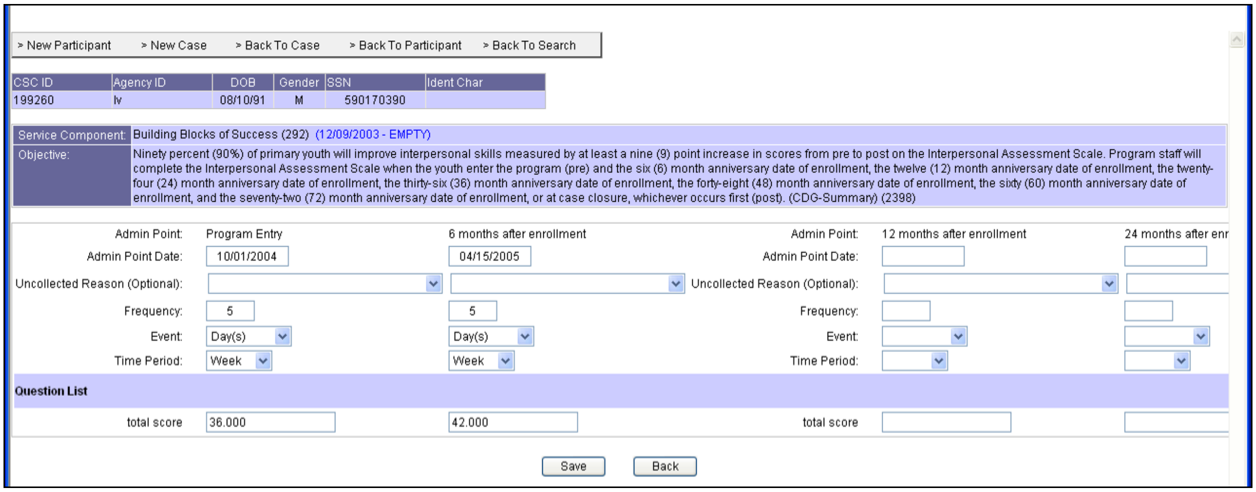


2. If you are unable to collect data from a participant for an administration point, select a response from the Uncollectible Reason pull down menu. Uncollectible Reasons will be counted as responses for the Measurable Objective Summary Report and each case will appear on the Measurable Objective Detail Report in "Objective Not Met" category. If you enter an uncollected reason, you will not be able to enter in information on the question list. **Contact the CSC if you are experiencing a systemic problem in obtaining data from the participants.**

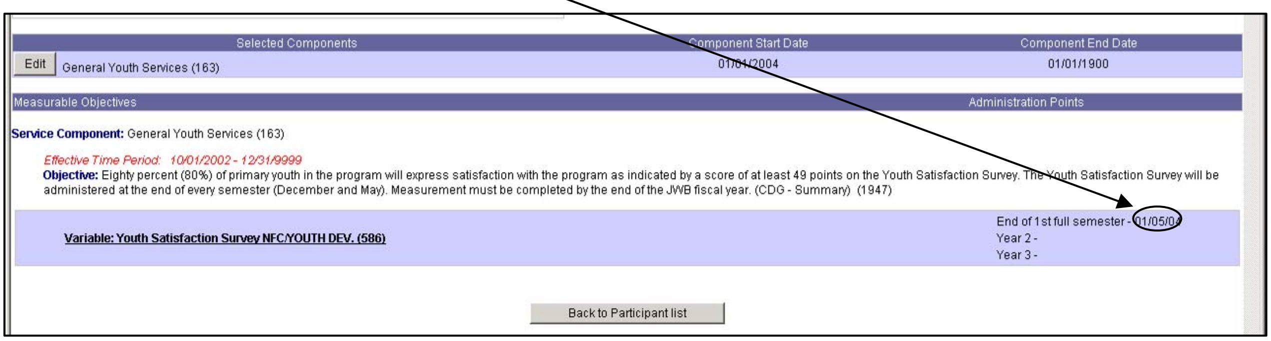
3. Next, enter the frequency with which the participant received service in the **Frequency, Event,** and **Time Period** boxes. If the participant received services three days a week, you would enter 3 in the Frequency box, pull down *day(s)* in the Event box, and pull down *week* in the Time Period box.

4. Enter the appropriate answer for each question in List of Questions.

5. Select **Save** to save your changes and return to the Measurable Objectives Service Components page. Or select **Back** to return without saving.



The administration point dates on the Measurable Objectives Service Components page will display the Administration Point Date you entered.



Types of Administration Points

There are many different types of Administration Points depending on the type of program for which the measurable objective is written. Here are some examples:

Pre Test
Post Test
Follow Up
At Program Intake
At Program Exit
[number] Days after program
After at least **[number]** sessions
Beginning of **[number]** grade
End of school year
At **[number]** year of age
At time of discharge
Within **[number]** Month of Entering Program

Calendar Connection:

All Administration Point Dates should be equal to or after their Service Component Start Date and equal to or before their Service Component End Date. No Exceptions.

TAKE NOTE:

All questions for each administration point must be answered to allow SAMIS to process your data.

Chapter 10 - Measurable Objective Quick Entry

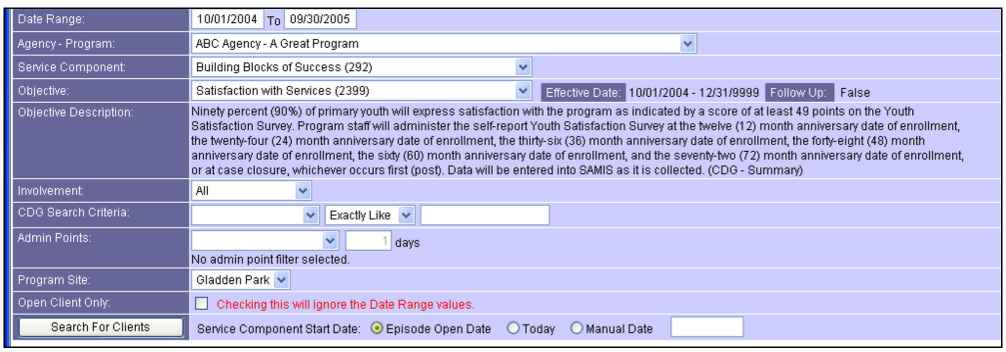
"This MO Module is not being used by the Children's Services Council of Broward County"

Utilizing this module, the user receives a list of participants based on search criteria and can quickly enter service component and objective data for all participants listed.

This chapter explains how to utilize the Measurable Objective Quick Entry module for data entry. For an in-depth explanation of how service components and measurable objectives work and relate to the participant please read the previous section "Entering Service Component/Measurable Objectives Utilizing Individual Case/Participants".

Searching for Specific Participants

1. From the SAMIS Main Menu, select Measurable Objective Quick Entry. The following page will display. **A user list will be generated based upon the criteria selected on this page.**



Date Range:	10/01/2004 To 09/30/2005
Agency - Program:	ABC Agency - A Great Program
Service Component:	Building Blocks of Success (292)
Objective:	Satisfaction with Services (2399) Effective Date: 10/01/2004 - 12/31/9999 Follow Up: False
Objective Description:	Ninety percent (90%) of primary youth will express satisfaction with the program as indicated by a score of at least 49 points on the Youth Satisfaction Survey. Program staff will administer the self-report Youth Satisfaction Survey at the twelve (12) month anniversary date of enrollment, the twenty-four (24) month anniversary date of enrollment, the thirty-six (36) month anniversary date of enrollment, the forty-eight (48) month anniversary date of enrollment, the sixty (60) month anniversary date of enrollment, and the seventy-two (72) month anniversary date of enrollment, or at case closure, whichever occurs first (post). Data will be entered into SAMIS as it is collected. (CDG - Summary)
Involvement:	All
CDG Search Criteria:	Exactly Like
Admin Points:	1 days No admin point filter selected.
Program Site:	Gladden Park
Open Client Only:	Checking this will ignore the Date Range values.
Search For Clients	Service Component Start Date: Episode Open Date Today Manual Date

2. Enter in the date range for the active participants you wish to view on the generated list. If you wish to search for currently open clients, rather than clients active at some point during the date range, check the Open Client Only check box.

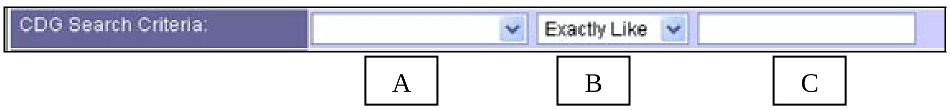
3. Select the **agency and program** from Agency-Program drop down box. The following screen will appear. The first available service component and objective will display by default.

4. If necessary, change the Service Component and Objective to the Service Component and associated Objective that you wish to update for the participant list that will be generated from the search.

5. Choose the **participant involvement type** from the Involvement drop down list. This will determine which participants will be displayed in the search results. (For example, select Primary – Child if the Objective applies only to the primary child). If you don't wish to search for specific involvement types, choose All from the selection list.

6. **Optionally**, you can use any of the **CDG Search Criteria** to search for specific participants by selecting the field you would like to search from the first drop down list.

   A. Enter the field to search on using the first drop down box.
   B. Select the matching criteria from the second drop down box. (See below for the matching criteria definitions)
   C. Enter the value to match during the search in the third text box.



7. **Optionally**, choose a program site from the **Program Site** pick list. If program sites have not been defined for your program, there will be no program sites in the pick list.
8. **Optionally**, choose **an administration point criterion** from the pick list. If you don't choose an option, no administration point criteria will be applied. You can choose from the following options:

   - **No Admin Points** – You will get participants attached to the objective, but who have no admin points.
   - **No Admin Points in the Last X Days** (You must enter a number of days for the search.) – You will get all participants who have not had an administration point within the number of days you have chosen.

9. Select **Search for Participants**. All participants who meet the specified criteria will be displayed similarly to the screen below.

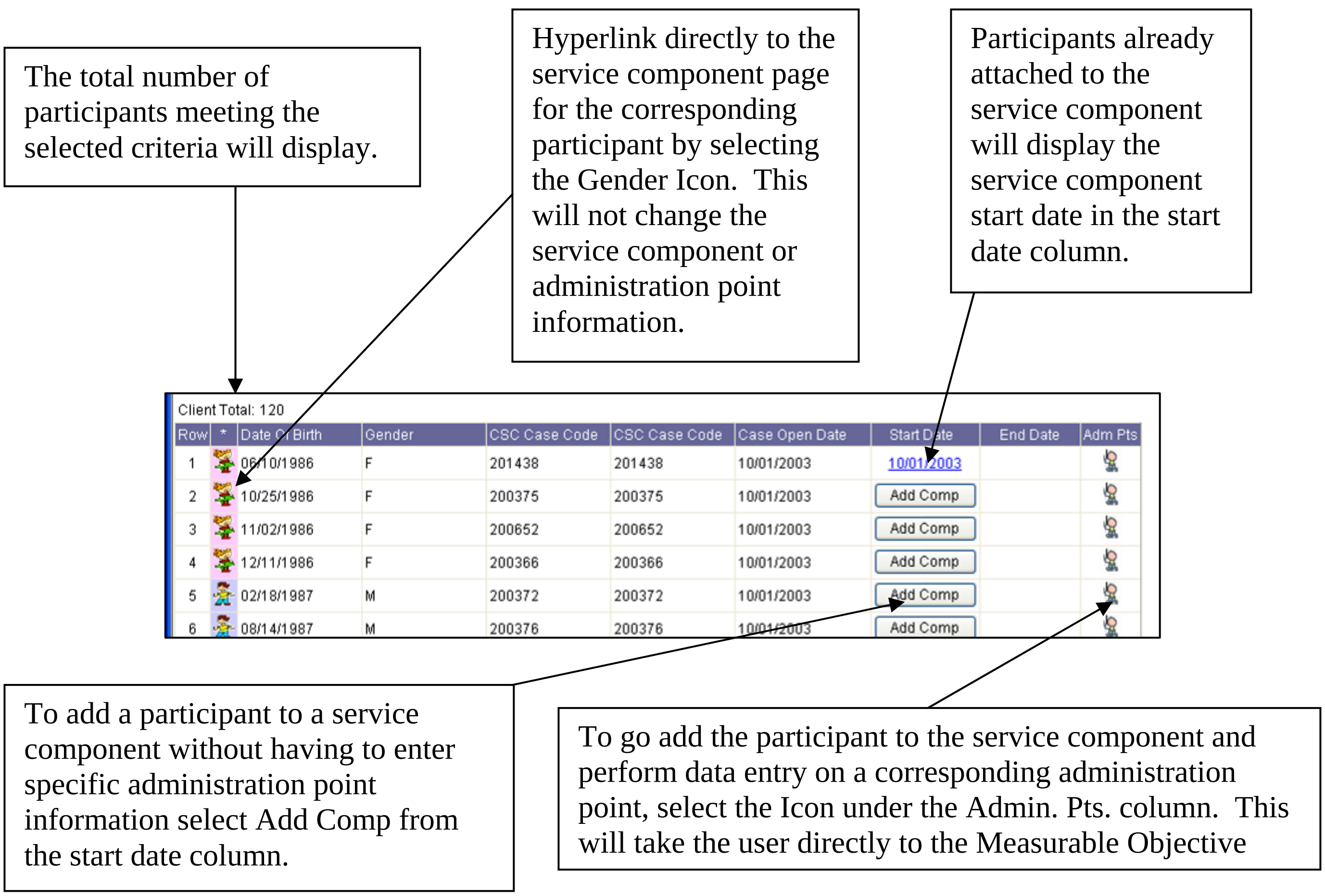
> **TAKE NOTE:** When searching, you must choose at least one criterion by which to search, otherwise your search will return zero cases.

Data Entry

Prior to adding a service component or administration point using MO Quick Data Entry, you will need to determine which date you wish to use for the service component start date by selecting an appropriate radio at the bottom of the screen. Here are your choices:

- Select the **Episode Open Date radio button** to default the service component start date to the case open date, **OR**
- Select the **Today radio button** to default the service component start dates to the current system date "today", **OR**
- Select the **Manual Date radio button** and enter in a valid date to default the service component start date to that specified date.

Once you have searched for a particular group of participants, you have many choices, outlined in the diagram below.



Row	*	Date Of Birth	Gender	CSC Case Code	CSC Case Code	Case Open Date	Start Date	End Date	Adm Pts
1		06/10/1986	F	201438	201438	10/01/2003	10/01/2003		
2		10/25/1986	F	200375	200375	10/01/2003	Add Comp		
3		11/02/1986	F	200652	200652	10/01/2003	Add Comp		
4		12/11/1986	F	200366	200366	10/01/2003	Add Comp		
5		02/18/1987	M	200372	200372	10/01/2003	Add Comp		
6		08/14/1987	M	200376	200376	10/01/2003	Add Comp		

Chapter 11 – Searching for CDG Data

Once you have established a case in SAMIS, added one or multiple participants to that case, assigned a service component to the participant, and entered any initial administration point data for the measurable objective, you may have to perform on or more of the following tasks:

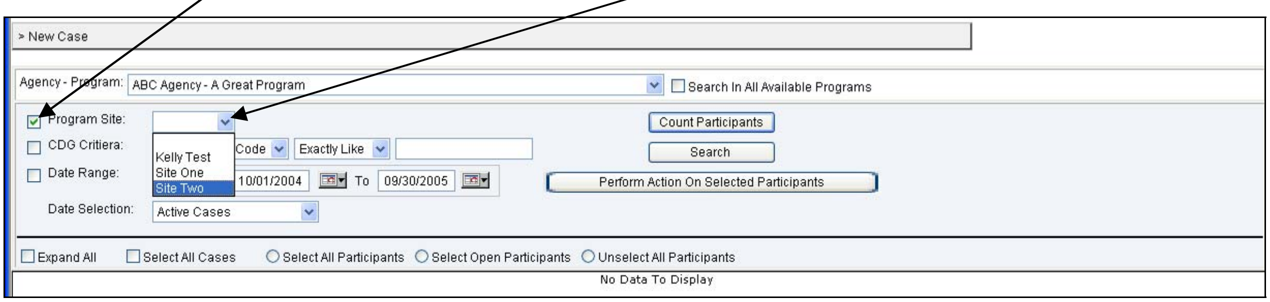
1. Search for cases and/or participants
2. Editing **Case**, **Participant,** or **MO** information.
3. **Closing an Episode**.
4. Updating or entering **Administration Point** data.
5. Adding another **Service Component** to a participant.
6. **Closing a Service Component**.
7. Re-opening and/or **Copying a Case**.
8. **Deleting a Case**.
9. **Deleting a Participant** from a case.

How to Search for an Existing Case

Searching for cases and participants in SAMIS Case Data Gatherer can be done by program sites, specific CDG criteria, targeted date ranges, or by all three methods together.

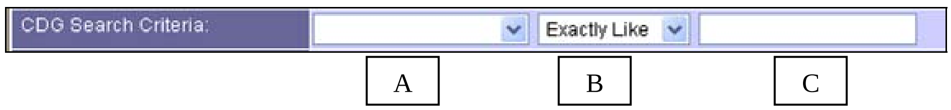
Searching by Program Site

1. Click the **Case Data Gatherer** hyperlink on the SAMIS Main Menu. A page like the one below will open up.
2. Select the **agency and program** which you would like to search from the Agency-Program drop down list or check the Search in All Available Programs check box to search in ***ALL programs to which you have access.***
3. **Select the Program Site** from the Program Site drop down list. (Sites will only appear in the drop down list if the program you're searching has associated sites.)
4. **Check the Program Site check box**.
5. Click the **Search** button.



Searching by CDG Criteria

1. Click the **Case Data Gatherer** hyperlink on the SAMIS Main Menu. A page like the one below will open up.
2. Select the **agency and program** which you would like to search from the Agency-Program drop down list or check the Search in All Available Programs check box to search in ALL programs to which you have access.
3. Enter the search parameters using the guidelines below.



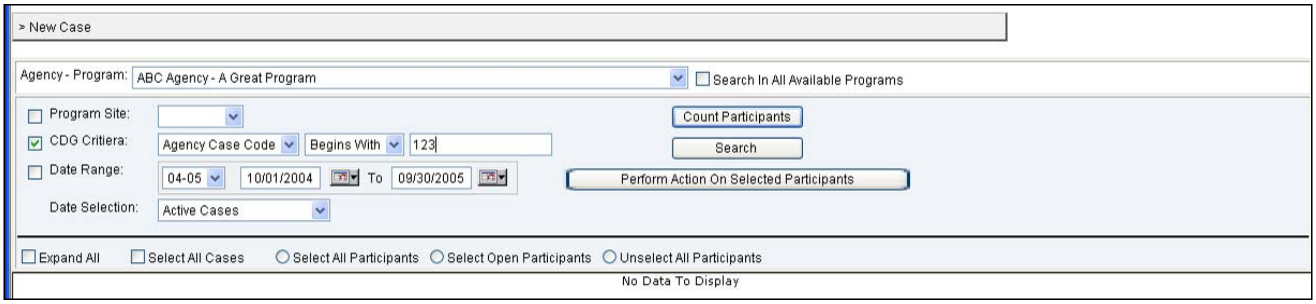
A. Enter the **field to search** on using the first drop down box. You can search by any of the following: Agency case code, Client ID, CSC Case Code, Date of Birth, First Name, Gender, Identifying Characteristic, Involvement, Last Name, Social Security Number, or Student ID.

B. Select the **matching criteria** from the second drop down box. (See below for the matching criteria definitions)

C. Enter the **value to match** during the search in the third text box.

Matching Criteria	Explanation
Exactly Like	An exact match will be looked for on the selected search field. If nothing matches the value entered in the text box then no results will be returned. For example, if the user chooses to search on last name and enters Johnson as the value to match, all cases will be returned that have a participant with the last name of Johnson.
Begins With	If the field being searched for begins with the value entered in the text box then the record will be returned. For example, if the user chooses to search on Student Id and enters 515 in the text box, all cases will be returned that have a participant with a Student Id beginning with 515. If one of the participants had a Student Id of 5150221, the case for this participant would be displayed on the results screen.
Ends With	If the field being searched for ends with the value entered in the text box then the record will be returned. For example, if the user chooses to search on Social Security Number and enters 2155 in the text box, all cases will be returned that have a participant with a Social Security Number ending with 2155. If a participant had a Social Security Number of 265-31-2155, the case would be displayed on the results screen.
Contains	If the field being searched for contains the value entered in the text box then the record will be returned. For example, if the user chooses to search on Agency Case Code and enters 301 in the text box, all cases will be returned that have an Agency Case Code containing 301. If the case had an Agency Case Code of 13014, the case would be displayed on the results screen.

4. Check the **CDG Criteria check box**.
5. Click the **Search** button.



TAKE NOTE: Additional validation of data will be performed to ensure that the data entered in the text box is the correct data type for the selected search field. The CSC Case Code, Social Security Number and Student Id will only allow numeric values. If the user selects one of these search fields and enters an alphanumeric value in the text box, an error message will pop up and the user will be required to enter a numeric value before searching. All other search fields will allow alphanumeric values.

TAKE NOTE:

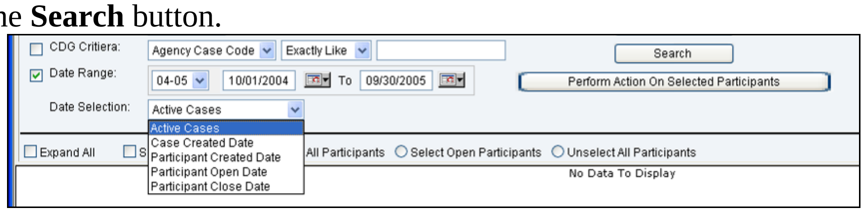
1. If the **Agency or CSC Case Code** is selected, the user must know the specific code assigned to the case.
2. The **CSC Case Code** is automatically assigned by the system to the case. It is a unique number.
3. Cases are called from the **SAMIS** database by **Agency ID** and **Program ID**, then the **Agency Case Code** is searched. Therefore, if two agencies used the same numbering system the cases from one agency would not be displayed in another agency **CDG Search Results** screen.

CDG Search by Time Period

1. Click the **Case Data Gatherer** hyperlink on the SAMIS Main Menu. A page like the one below will open up.
2. Select the **agency and program** which you would like to search from the Agency-Program pick list or check the Search in All Available Programs check box to search in ALL programs to which you have access.
3. Choose the date scheme you would like to use from the **Date Selection** pick list.

Date Scheme Selections	
Pick List Item	**Meaning**
Active Cases	Searches for cases with at least one participant with at least one active episode day during the timeframe chosen.
Case Created Date	Searches for the actual date the case was entered into SAMIS by the data entry person, regardless of episode open and close dates.
Participant Created Date	Searches for the actual date the participant was first entered into SAMIS by the data entry person, regardless of episode open and close dates.
Participant Open Date	Searches for participants with specific Episode Open Dates within the timeframe chosen.
Participant Close Date	Searches for participants with specific Episode Close Dates within the timeframe chosen.

4. Enter the associated **date range** you would like to search using the date quick selection tool. There are several ways to select dates. Please consult the SAMIS Quick Tips section for full details.
5. **Click the Date Range check box**.
6. Click the **Search** button.



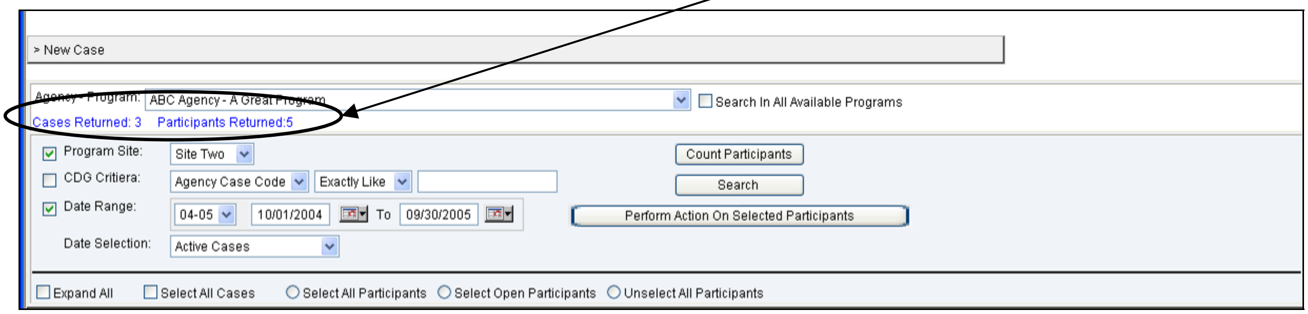
Searching by Several Different Criteria

You can combine the searches described above by checking the check boxes next to the search criteria you would like to use. For example, you could search by program site and a specific date range at the same time.

Counting Cases and Participants Using CDG Search

You can use CDG Search to count cases and participants associated with certain criteria.

1. Simply choose the criteria as you would for a search.
2. Then, click the **Count Participants** button instead of the Search Button. The search time will be shortened because only the number of *cases and participants* will be displayed.



TAKE NOTE: The count of cases and participants appears after every search. The Count Participants button should be used when the number of participants is the only information desired.

TAKE NOTE:

- When searching, you must choose at least one criterion by which to search, otherwise your search will return zero cases.
- The more search criteria used, the more specific the results returned will be.

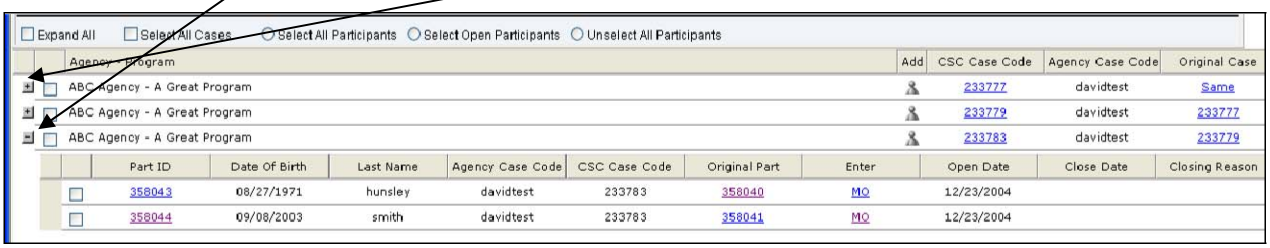
Chapter 12 - Editing Case Data Gatherer Information

Working with Search Results

Once you have searched for specific cases or participants, you will want to access case and participant information to make changes or simply to view the data entered. SAMIS presents this information in a dashboard format in which you can view, access, and simultaneously select much of the information contained in a case. You can expand one or all cases on the search screen, perform actions on individual participants, or perform actions on groups of participants.

Expanding a Single Case

You can expand a single case on the CDG search results by clicking the **plus sign** next to the case. This allows you easy access to the case, participant, and MO information. To collapse the case, click the **minus sign** next the already expanded case.



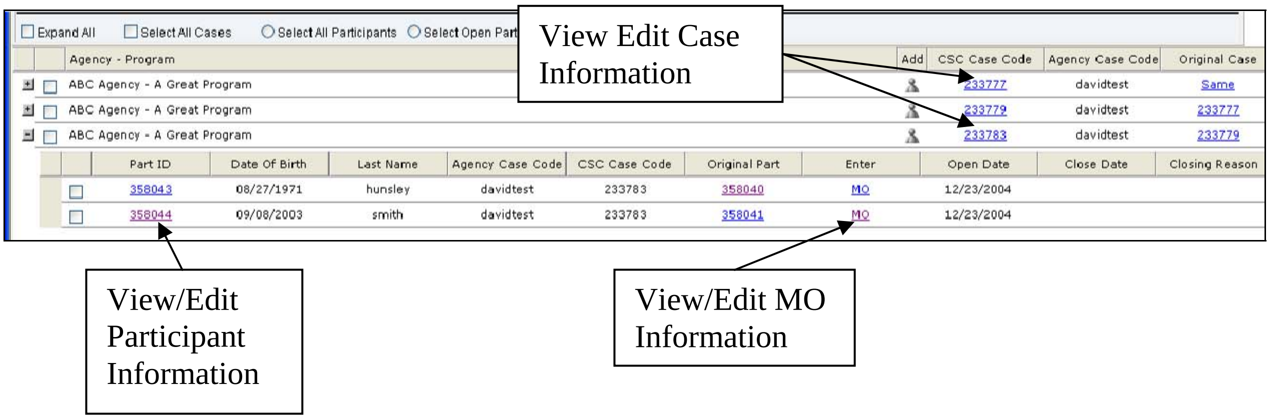
Expanding All Cases

You can also expand all cases in the CDG search results by clicking the **Expand All check box** at the top of the search results.

Editing Case, Participant, and MO Information

To edit or view case, participant, and MO data from the CDG search results follow these steps.

1. **Expand the case** containing the information you wish to view.
2. **Click the appropriate link** based on the diagram below.



3. **View or change any information** you wish when the case, participant, or MO screen appears.
4. Be sure to click the **Save Data** button on the menu bar at the top of the data entry screen if changes have been made.

Performing Actions on Selected Participants

Certain common actions can be performed on one or more cases or one or more participants. This function saves time by allowing you to perform the same action across as many cases or participants as necessary. Depending on the action you are performing certain data fields are required and will apply to all cases or participants included in the action.

Mass Actions

Action	Level	Required Fields*
Copy closed case(s) to same program	Case	All cases selected must share the same New Open Date.
Copy case(s) to a different program	Case	All cases selected must have the same: • New program • New Opening Date • Agency Case Code (optional) • Primary Participation Reason • Secondary Participation Reason(s) • Primary Activity

		• Secondary Activities • Referred From
Delete case(s)	Case	No rules.
Delete participant(s)	Participant	No rules.
Close Participant(s)	Participant	All participants selected must have the same: • Closing Reason • Closing Date • Referred To
New Participant Episode(s)	Participant	All participants selected must have the same New Open Date.
Print Client Level Detail Report	Case	No rules.
*Data placed in these fields will apply to all cases or participants selected as part of the action.		

TAKE NOTE: Any case may be copied to another program. Only closed cases may be copied to the same program. The following fields are copied to the new case(s): Agency Case Code, Household Arrangement, Household Income, and all participant demographics. The following fields must be updated in the new case(s): Referred From, Closing Reason, Closing Date, Referred To, Reasons for Participation, and Primary Activities.

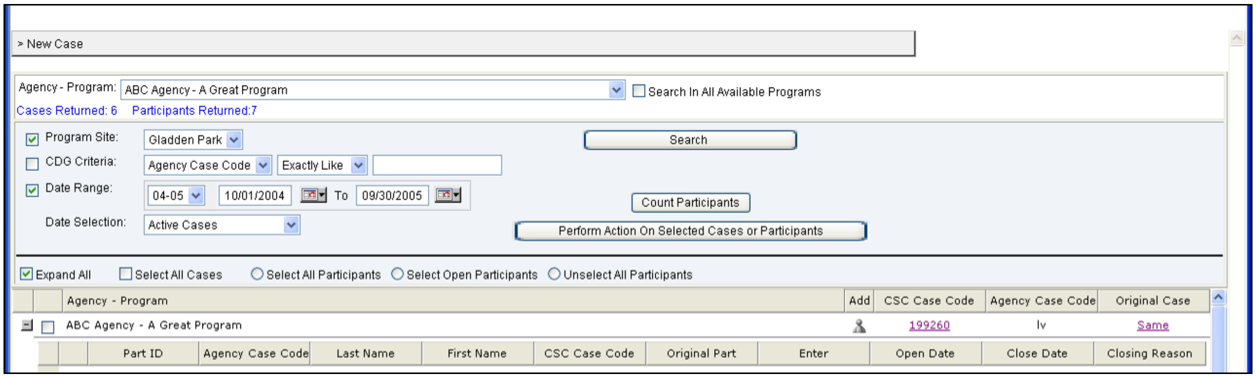
Selecting Cases or Participants for Actions

What do you want to do?	How to do it.	Extent of Action
Select an individual case.	**Check the check box next to the case.**	Chosen case
Unselect an individual case.	**Uncheck the check box next to the case.**	Chosen case
Select an individual participant.	Expand the case. **Check the check box next to the participant.**	Chosen participant
Unselect an individual participant.	**Uncheck the check box next to the participant.**	Chosen participant
Select all cases.	**Check the Select All Cases check box**.	Selects all cases on the search screen.
Unselect all cases.	If you have used the Select All check box, **uncheck the Select All Cases check box**.	Cases selected using the Select All check box will be unchecked. This will not uncheck individually selected cases.
Select all participants.	**Select the Select All Participants radio button**.	Selects all participants on the search screen.
Select open participants only.	**Select the Select Open Participants radio button**.	Selects all participants with open episodes on the search screen.
Unselect all selected participants	**Select the Select All Participants radio button**.	Unselects all of the chosen participants.

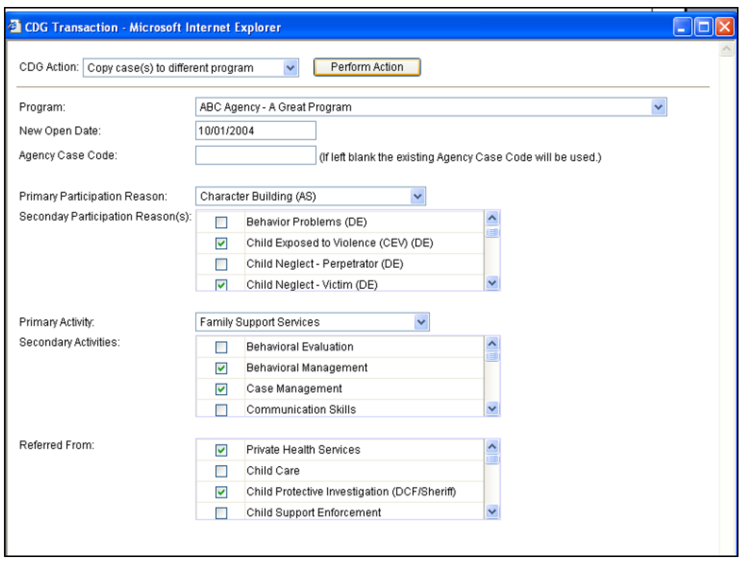
Take Note: The screen will refresh to the specific buttons chosen.

Performing Actions

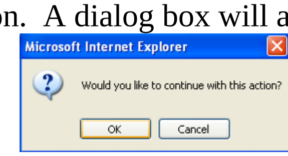
To perform actions on one or more cases or participants, follow these steps.



1. From the SAMIS Main Menu, click the **Case Data Gatherer** hyperlink.
2. Perform a **search to find cases and participants**.
3. **Select the cases or participants to be modified** using the instructions in the previous section.
4. Click the **Perform Action on Selected Cases or Participants** button. A pop up window will appear.



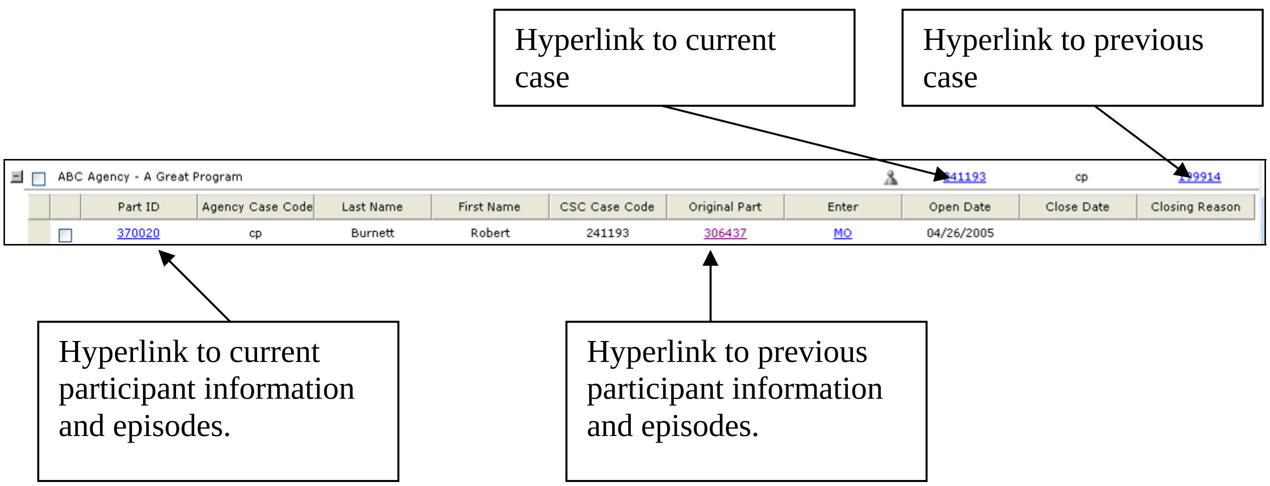
5. Choose the desired action form the CDG Action pick list.
6. Fill in the required information for the selected action using the fields that appear. Data placed in these fields will apply to all cases or participants selected as part of the action.
7. Click the Perform Action button. A dialog box will appear.



8. Click Ok to continue the action. The main pop up window will refresh and summarize actions completed and any problems encountered.
9. Close the pop up window and you will be returned to the search.

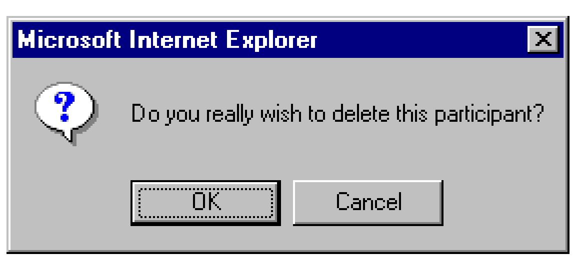
Tracking Copied Cases

SAMIS provides a trail of copied cases and participants. When a case is copied either to the same program or another program, a message is displayed in the CDG Transaction pop up window telling you the new and old case and participant numbers. This information also displays interactively on the CDG search results for cases and participants. You can view and edit new and previous participant information by clicking on the appropriate hyperlink.



Delete a Participant from the CDG Case Screen

You can delete participants or cases by performing actions on the using the Perform Actions on Selected Cases and participants button. In addition, you can delete a participant from the Case Screen by clicking the X next to the participant you wish to delete. A dialog box like the one below will appear, click OK.



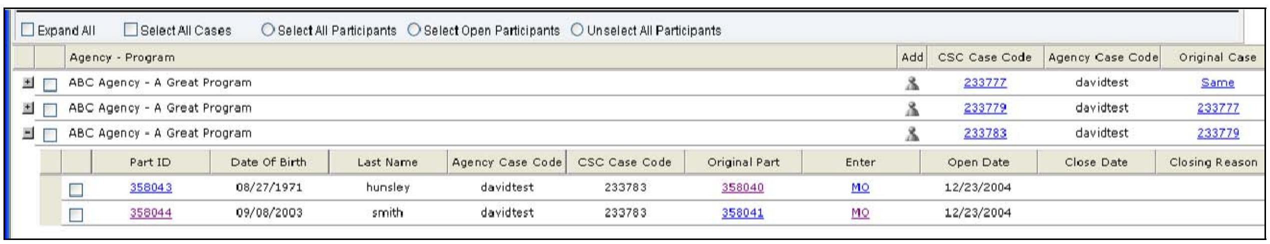
Chapter 13 - Episode Closure Procedures

To close out an episode of service for a participant in a case, two tasks must be completed. First, all current measurable objective information must be entered for the participant and associated service components should be closed; there are exceptions for follow up objectives which will be explained later. Second, a close date for the episode and a closing reason must be entered.

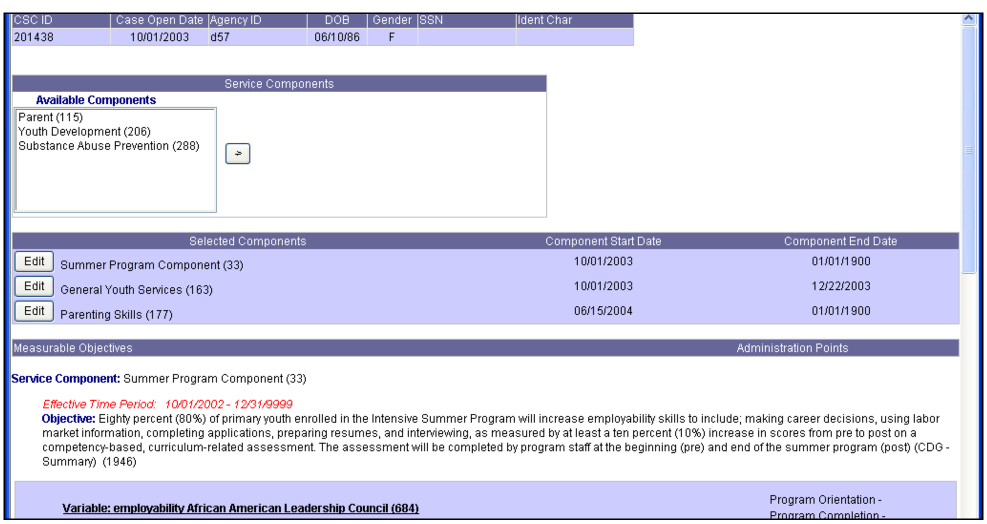
Accessing and Editing Measurable Objectives

Follow these steps to access and edit a measurable objective.

1. **Search** for your participant or case.
2. Click the **MO hyperlink** next to the desired participant. This will take you to the MO screens.

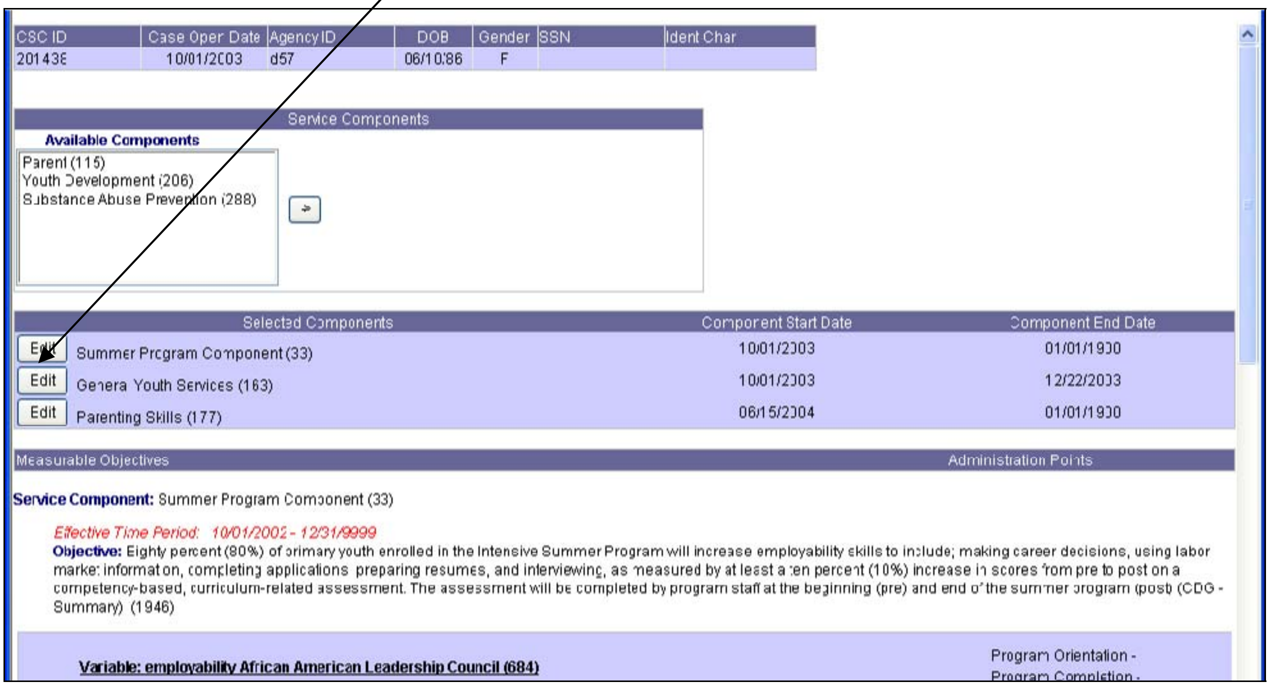


3. From the Measurable Objectives screen, you can enter or update administration points through the Variable hyperlinks located under each measurable objective, add another service component, and/or close the service component by adding an end date. **You should make sure that all measurable objective requirements have been met prior to closing a service component.**

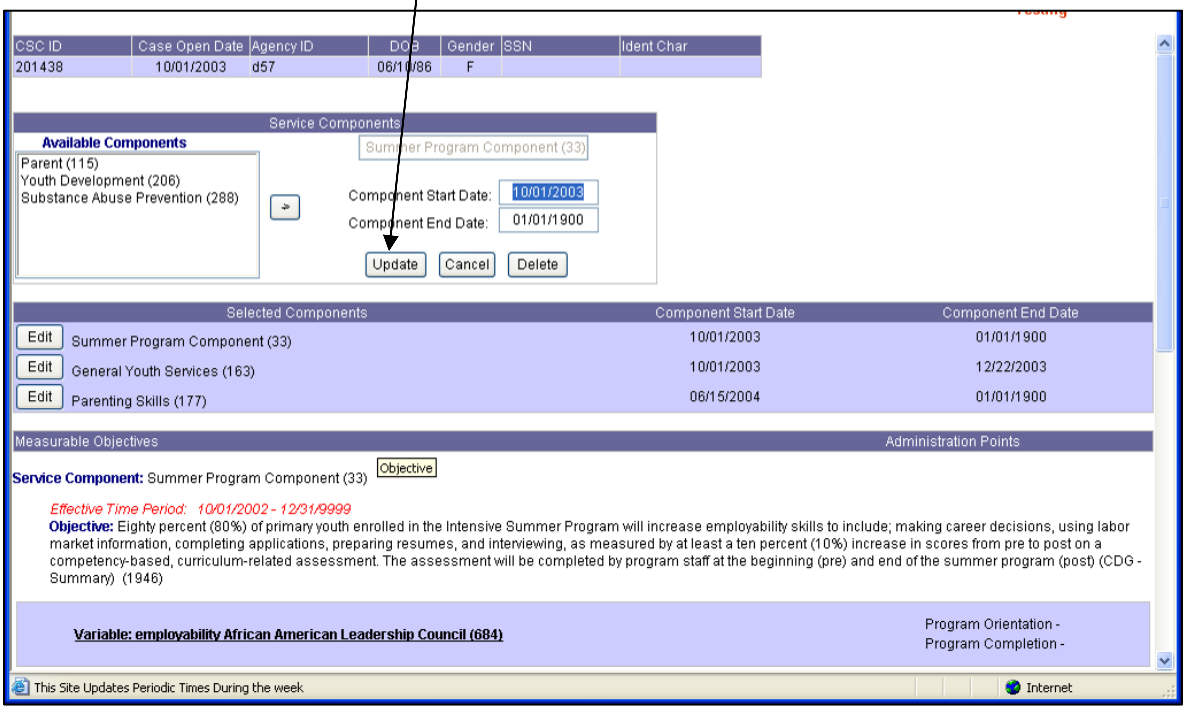


Editing and Closing a Service Component

1. To edit and close a service component, you must first enter the measurable objectives screen (See the "Accessing and Editing Measurable Objectives" section for instructions.)
2. Next, you should click the **Edit** button next to the component you wish to change or close. The measurable objective screen will appear.



3. You can close the service component by entering a new component end date in the following format **MM/DD/YYYY**.
4. Then you should click **Update** to complete the date change.

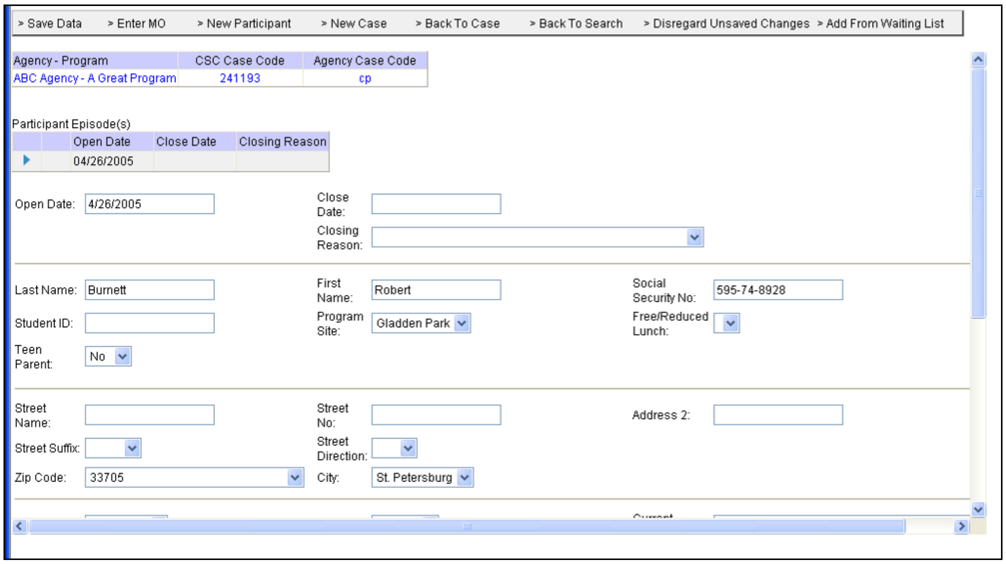


Calendar Connection: Each Service Component End Date should be equal to or before the last Episode Close Date. <u>Exception</u>: If you have a follow up date, which occurs after the participant episode should be closed, you must enter a Service Component End Date, which occurs after the Episode Close Date.

TAKE NOTE:
Data entry can also be performed by utilizing the Measurable Objective Quick Entry Module in SAMIS. Please see the section regarding this earlier in this manual for more detailed information

Closing an Episode

Once you have fulfilled all measurable objectives and ended all necessary service components, you should then close the episode for the participant. You can do so by navigating to the CDG Participant Screen or using the **Perform Action on Selected Cases or Participants** button as described previously. Follow the steps below to close the participant from the CDG Participant Screen.



1. Navigate to the **CDG Participant Screen**.
2. Enter a **closing date** for the episode in the Closing Date date box.
3. Choose a **closing reason** using the Closing Reason pick list.
4. Click the **Save Data** button on the on the menu bar at the top of the screen.

TAKE NOTE: If a participant has been previously closed, the user must have specific user rights to re-open an episode or modify the close date. Contact the SAMIS Helpdesk for access to modify a close date.

Calendar Connection:

- The Episode Close Date should be after the Episode Opening Date. No Exceptions.
- If there is a follow up objective, the Episode Close Date will occur at the end of services and prior to the Service Component End Date.

Chapter 14 - Working with Consecutive Episodes

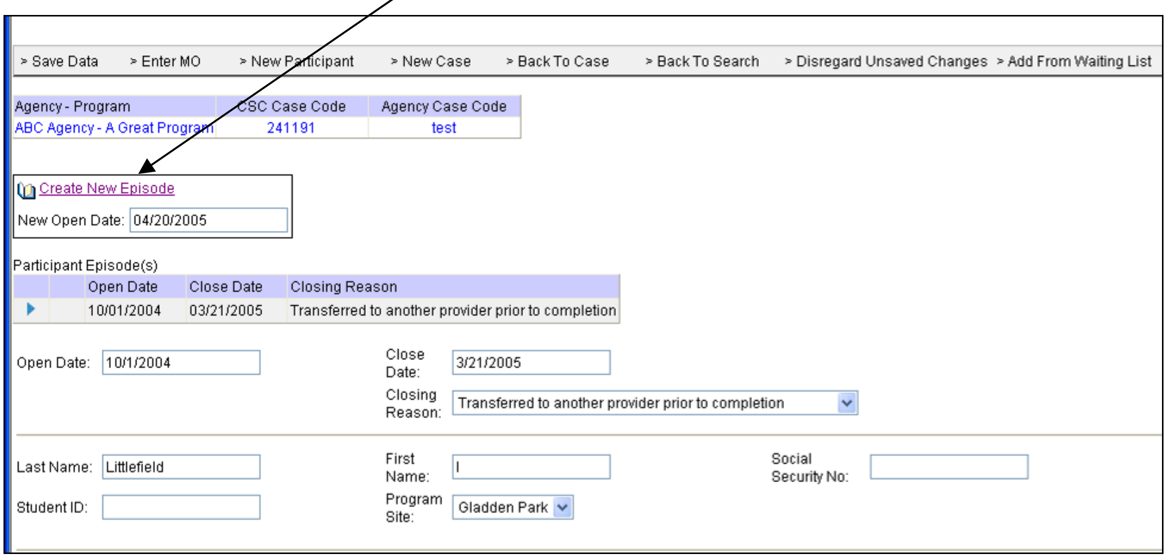
"This module is not being used by the Children's Services Council of Broward County"

Opening a New Episode

By CSC policy, a new episode should be opened for a closed participant in a case as long as at least one other primary or secondary in the case remains open. New episodes only apply to participants whose episodes are all closed. To open a new episode for a previously closed participant, you can either use the Perform Action on Selected Cases or Participants button or open the new episode from the Participant screen.

New Episode from the CDG Participant Screen

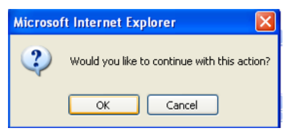
1. **Navigate to the CDG Participant screen** by clicking the participant hyperlink for the participant to whom you would like to add a new episode from the CDG Case screen or the CDG search results.
2. On the CDG Participant Screen, **enter the episode open date** for the new episode in the New Open Date date box.
3. **Click the Create New Episode hyperlink**.
4. Update any information pertinent to the new episode and click Save Data.



New Episode Using Perform Action

1. **Search for the participant** or case using the CDG search.
2. **Check the check box associated with the closed participant.**
3. Click the **Perform Action on Selected Cases or Participants** button. A CDG Transaction pop up window will appear.

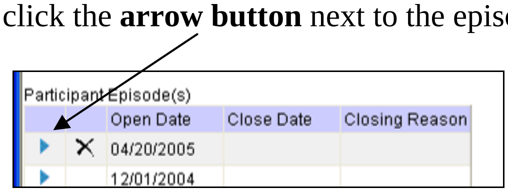
4. Choose **New Participant Episode** from the CDG Action pick list.
5. Enter the **new open date** in the New Open Date date box.
6. Click the **Perform Action** button. A dialog box will appear.



7. **Click OK** to continue the action. The main pop up window will refresh and summarize actions completed and any problems encountered.
8. Close the pop up window and you will be returned to the search.

Viewing Episodes

A list of episodes appears on the participant screen. The current episode displays automatically. To view a previous episode, click the **arrow button** next to the episode.



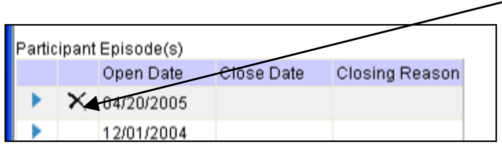
Editing Episodes

To edit information specific to a particular episode follow the steps below.

1. Select the **arrow button** next to the episode you wish to edit.
2. **Edit the desired information** for the selected episode.
3. Click the **Save Data button.** The screen will refresh to the latest episode.

Deleting Episodes

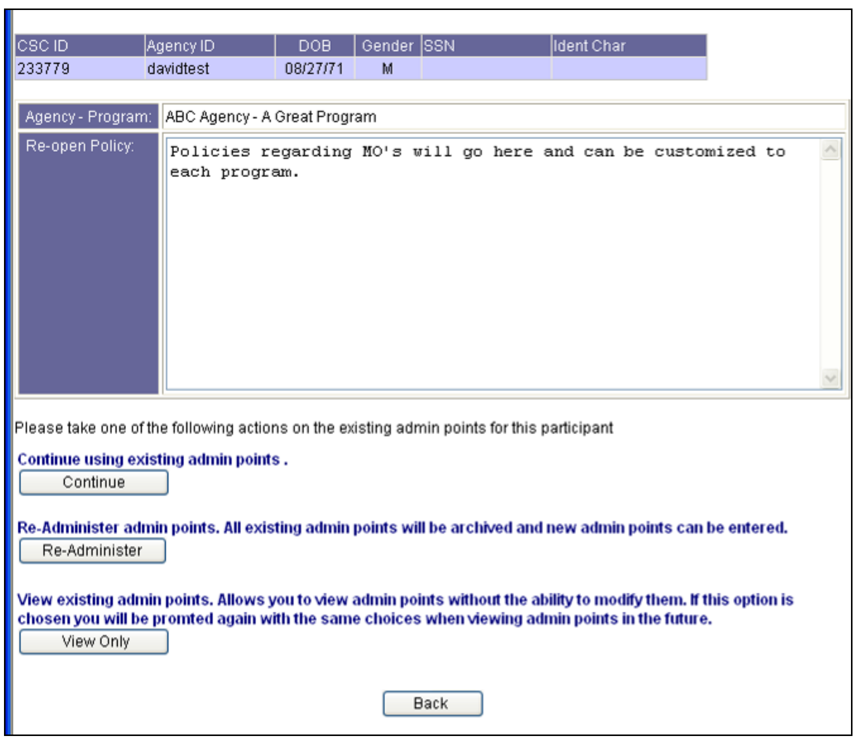
You may only delete the most recent episode. To delete the latest episode, click the X next to that episode.



MO Choices for Reopened Episodes

When you work with measurable objectives associated with a new episode for the participant, you will have several options to consider. When you enter the variable for the MO, a page like the one below will appear. This page will display policies regarding the chosen program’s MOs to help you decide on an appropriate action. Use the table below to help you choose and appropriate action. Once you have chosen the appropriate action by clicking the associated button, you will be able to navigate MOs normally. These choices can be applied to all MOs across the program or for individual MOs by the CSC.

Button	Action
View Only	You will be able to view the administration points prior to making a decision about continuing or re-administering the current administration points. You will not have the ability to change anything within the administration points.
Re-administer	All existing administration points will be archived and you will start fresh with new admin points.
Continue	Continue using existing administration points.



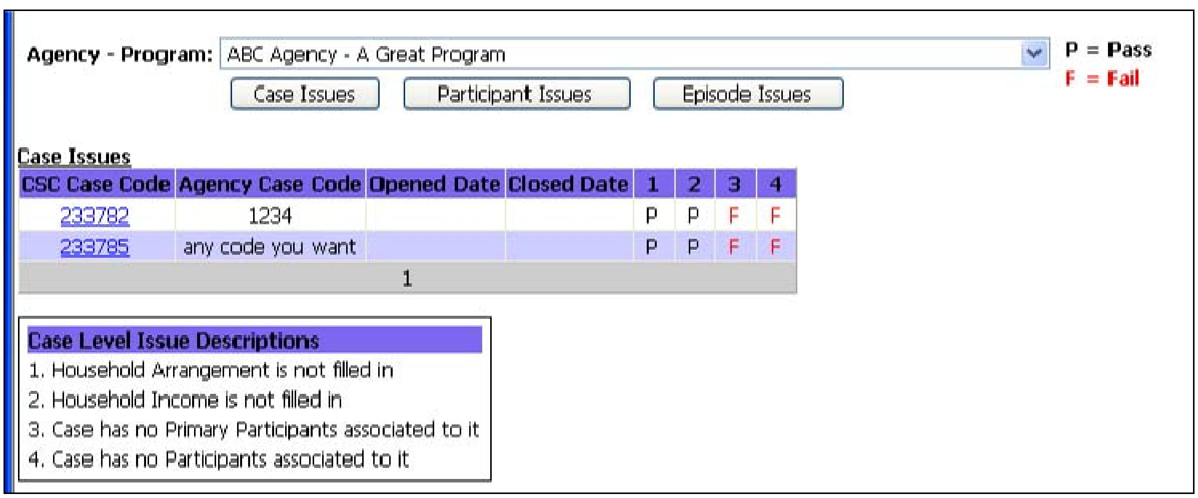
Chapter 15 - CDG Data Cleansing

Overview

The CDG Data Cleansing module allows users to find data entry problems, connect to the identified trouble spots, and correct the identified issues concerning all data ever entered into SAMIS. Users may move back and forth from the CDG Data Cleansing module to the Case Data Gatherer screens. Some identified issues may not need changes, depending on the extent of CSC policies.

Using the CDG Data Cleansing Module to Solve Case-Level Issues

1. From the SAMIS main menu, click on the **CDG Data Cleansing** module icon under Program Functions.
2. Choose the appropriate **agency and program** from the Agency-Program drop down list.
3. Click the **Case Issues** button. A list of cases with possible issues will appear.


Agency - Program: ABC Agency - A Great Program

Case Issues | Participant Issues | Episode Issues

P = Pass
F = Fail

Case Issues

CSC Case Code	Agency Case Code	Opened Date	Closed Date	1	2	3	4
233782	1234			P	P	F	F
233785	any code you want			P	P	F	F
1							

Case Level Issue Descriptions
1. Household Arrangement is not filled in
2. Household Income is not filled in
3. Case has no Primary Participants associated to it
4. Case has no Participants associated to it

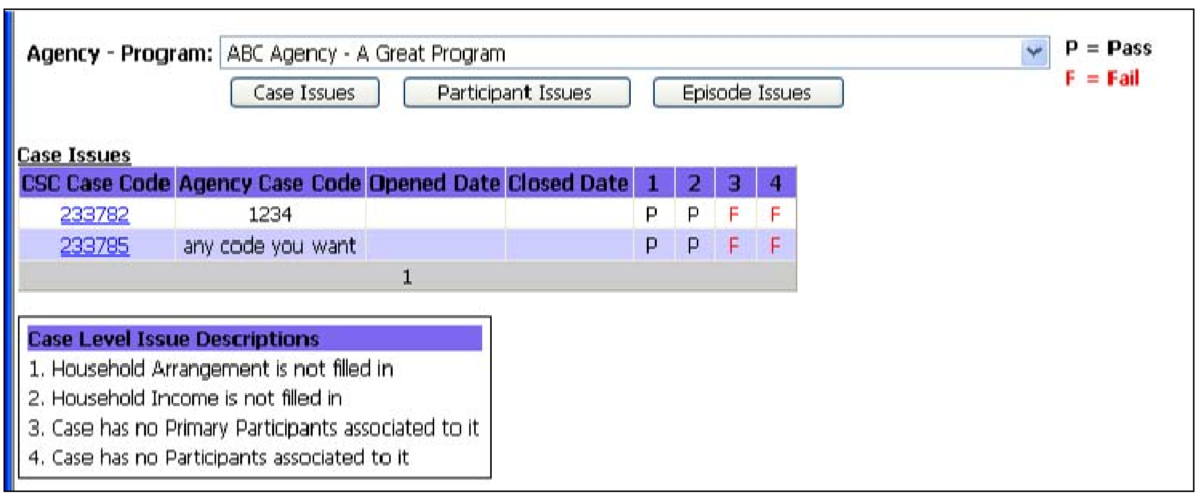
Types of Case-Level Issues

The results of the Case-Level CDG Data Cleansing list only cases with at least one problem. The numbered columns refer to the problem descriptions listed below. An "F" for failing underneath a column indicates that the problem in the description associated with the column exists in the listed case. A "P" for passing indicates no problems in that area.

Case-Level Data Cleansing Issues	
Column Number	**Data Cleansing Issue**
1	Household Arrangement is not filled in
2	Household Income is not filled in
3	Case has no Primary Participants associated to it
4	Case has no Participants associated to it

Solving Case-Level Issues

1. On the Case Issues display list, click the blue, hyperlinked **CSC Case Code**. You will be transported to the case in question.



2. **Correct any indicated problems** and save the changes by clicking the **Save Data** button.
3. Click the **Back to Cleansing** button to return to the data cleansing results.
4. Move on to the next case.

> Save Data > Back To Data Cleansing > Disregard Unsaved Changes

Agency - Program	CSC Case Code
ABC Agency - A Great Program	233782

Agency Case Code: 1234 Household Arrangement: Single Parent (expires 9/30/2005) Household Income: 10000.00 - 19999.00

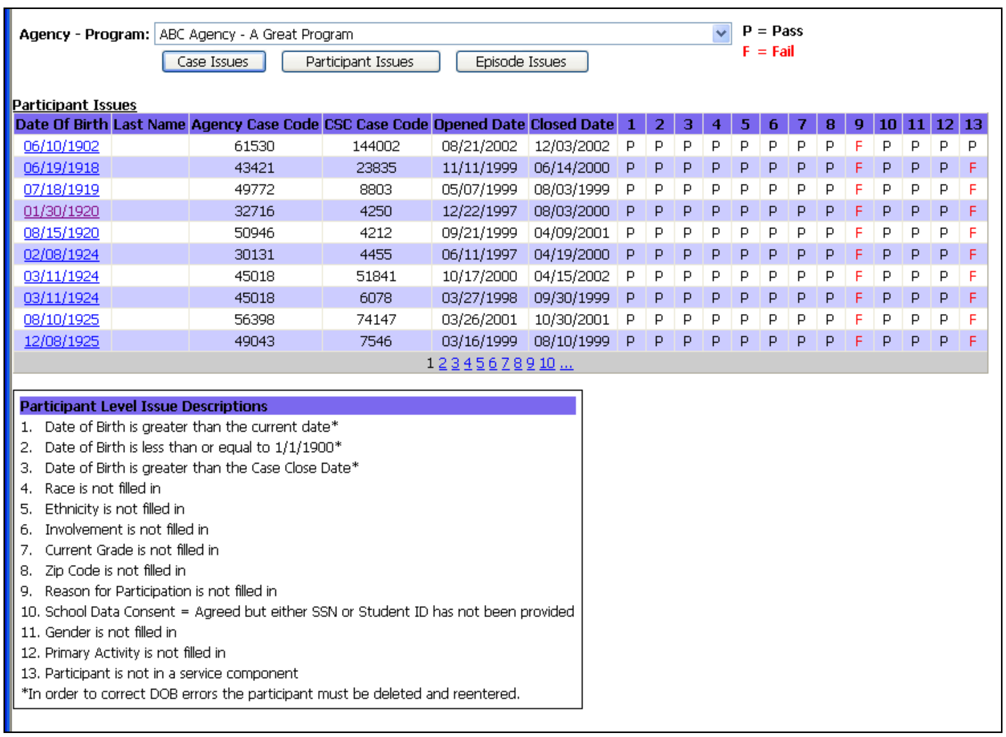
Adults In Household: 19 Children In Household:

Referrals

Select	Referred From
☑	Child Support Enforcement
☐	Child Care
☐	Child Protective Investigation (DCF/Sheriff)
☐	Counseling Program

Using the CDG Data Cleansing Module to Solve Participant-Level Issues

1. From the SAMIS main menu, click on the **CDG Data Cleansing** module icon under Program Functions.
2. **Choose the appropriate agency and program** from the Agency-Program drop down list.
3. Click the **Participant Issues** button. A list of participants with possible issues will appear.



Agency - Program: ABC Agency - A Great Program

Case Issues | Participant Issues | Episode Issues

P = Pass
F = Fail

Participant Issues

Date Of Birth	Last Name	Agency Case Code	CSC Case Code	Opened Date	Closed Date	1	2	3	4	5	6	7	8	9	10	11	12	13
06/10/1902		61530	144002	08/21/2002	12/03/2002	P	P	P	P	P	P	P	P	F	P	P	P	P
06/19/1918		43421	23835	11/11/1999	06/14/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
07/18/1919		49772	8803	05/07/1999	08/03/1999	P	P	P	P	P	P	P	P	F	P	P	P	F
01/30/1920		32716	4250	12/22/1997	08/03/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
08/15/1920		50946	4212	09/21/1999	04/09/2001	P	P	P	P	P	P	P	P	F	P	P	P	F
02/08/1924		30131	4455	06/11/1997	04/19/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
03/11/1924		45018	51841	10/17/2000	04/15/2002	P	P	P	P	P	P	P	P	F	P	P	P	F
03/11/1924		45018	6078	03/27/1998	09/30/1999	P	P	P	P	P	P	P	P	F	P	P	P	F
08/10/1925		56398	74147	03/26/2001	10/30/2001	P	P	P	P	P	P	P	P	F	P	P	P	F
12/08/1925		49043	7546	03/16/1999	08/10/1999	P	P	P	P	P	P	P	P	F	P	P	P	F

1 2 3 4 5 6 7 8 9 10 ...

Participant Level Issue Descriptions

1. Date of Birth is greater than the current date*
2. Date of Birth is less than or equal to 1/1/1900*
3. Date of Birth is greater than the Case Close Date*
4. Race is not filled in
5. Ethnicity is not filled in
6. Involvement is not filled in
7. Current Grade is not filled in
8. Zip Code is not filled in
9. Reason for Participation is not filled in
10. School Data Consent = Agreed but either SSN or Student ID has not been provided
11. Gender is not filled in
12. Primary Activity is not filled in
13. Participant is not in a service component

*In order to correct DOB errors the participant must be deleted and reentered.

Types of Participant-Level Issues

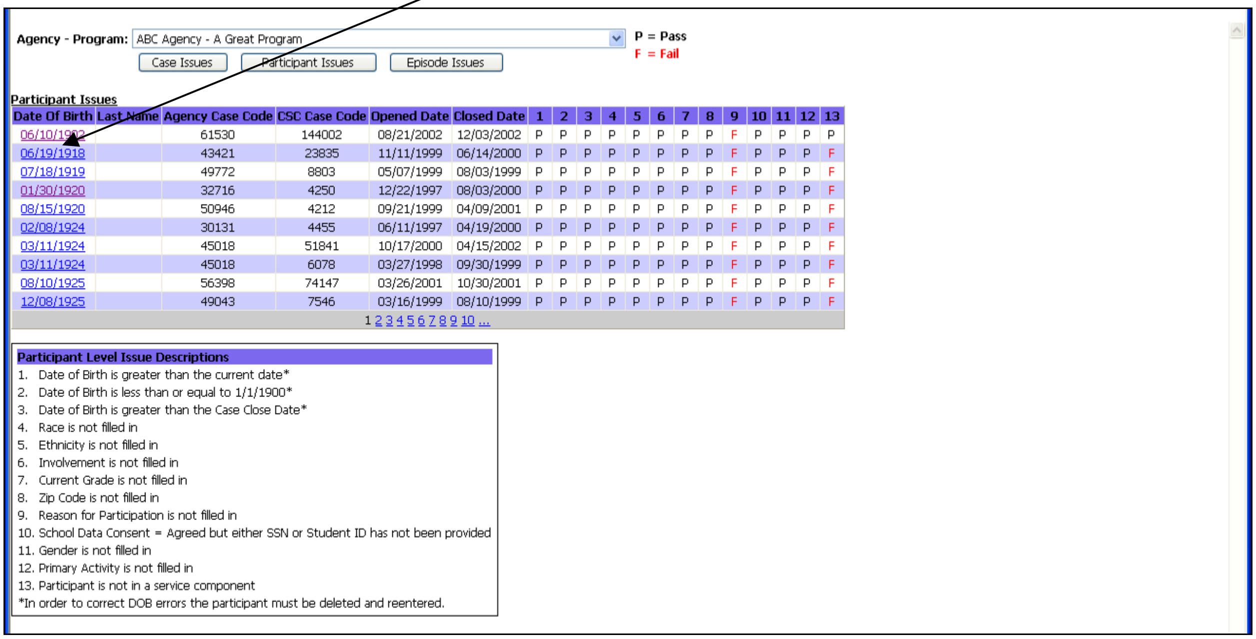
The results of the Participant-Level CDG Data Cleansing list only participants with at least one problem. The numbered columns refer to the problem descriptions listed below. An "F" for failing underneath a column indicates that the problem in the related description exists for the listed participant. A "P" for passing indicates no problems in that area.

Participant-Level Data Cleansing Issues	
Column Number	**Data Cleansing Issue**
1	Date of Birth is greater than the current date*
2	Date of Birth is less than 1/1/1900*
3	Date of Birth is greater than the Case Close Date*
4	Race is not filled in
5	Ethnicity is not filled in
6	Involvement is not filled in
7	Current Grade is not filled in
8	Zip Code is not filled in
9	Reason for Participation is Development but no Asset is selected
10	School Data Consent = Agreed but either SSN or Student ID has not been provided
11	Gender is not filled in
12	Primary Activity is not filled in
13	Participant is not in a service component
*In order to correct DOB errors the participant must be deleted and reentered	

TAKE NOTE: Secondary participants identified as "Participant is not in a service component" may not be required to have an attached service component. Please consult you contract or contract manager for further information.

Solving Participant-Level Issues

1. On the Participant Issues display list, click the **blue, hyperlinked Participant identifying field** under the first column. The type of information displayed in this first field will be determined by which field is first in the four Participant Identifier Fields, designated for a particular program.



Agency - Program: ABC Agency - A Great Program

P = Pass
F = Fail

Case Issues | Participant Issues | Episode Issues

Participant Issues

Date Of Birth	Last Name	Agency Case Code	CSC Case Code	Opened Date	Closed Date	1	2	3	4	5	6	7	8	9	10	11	12	13
06/10/1902		61530	144002	08/21/2002	12/03/2002	P	P	P	P	P	P	P	P	F	P	P	P	P
06/19/1918		43421	23835	11/11/1999	06/14/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
07/18/1919		49772	8803	05/07/1999	08/03/1999	P	P	P	P	P	P	P	P	F	P	P	P	F
01/30/1920		32716	4250	12/22/1997	08/03/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
08/15/1920		50946	4212	09/21/1999	04/09/2001	P	P	P	P	P	P	P	P	F	P	P	P	F
02/08/1924		30131	4455	06/11/1997	04/19/2000	P	P	P	P	P	P	P	P	F	P	P	P	F
03/11/1924		45018	51841	10/17/2000	04/15/2002	P	P	P	P	P	P	P	P	F	P	P	P	F
03/11/1924		45018	6078	03/27/1998	09/30/1999	P	P	P	P	P	P	P	P	F	P	P	P	F
08/10/1925		56398	74147	03/26/2001	10/30/2001	P	P	P	P	P	P	P	P	F	P	P	P	F
12/08/1925		49043	7546	03/16/1999	08/10/1999	P	P	P	P	P	P	P	P	F	P	P	P	F

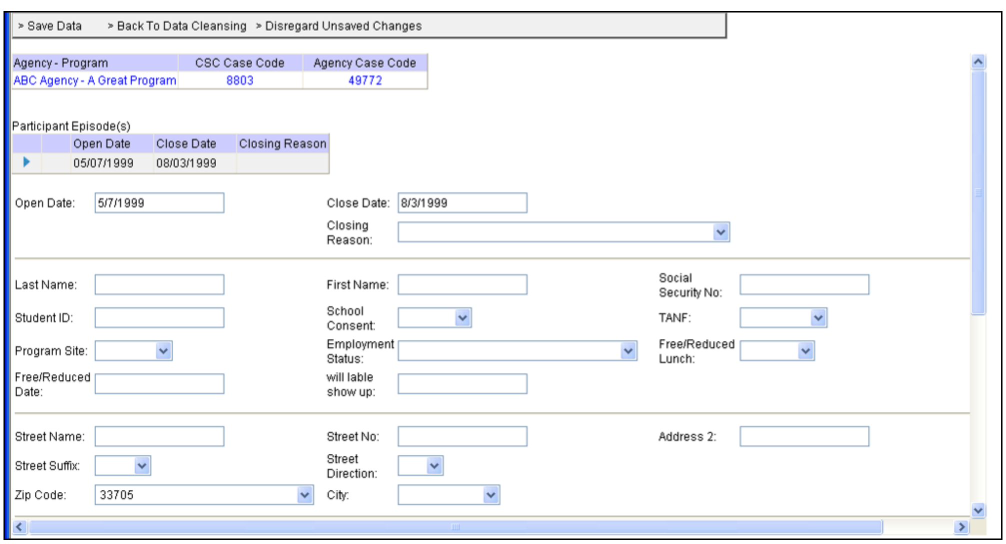
1 2 3 4 5 6 7 8 9 10 ...

Participant Level Issue Descriptions

1. Date of Birth is greater than the current date*
2. Date of Birth is less than or equal to 1/1/1900*
3. Date of Birth is greater than the Case Close Date*
4. Race is not filled in
5. Ethnicity is not filled in
6. Involvement is not filled in
7. Current Grade is not filled in
8. Zip Code is not filled in
9. Reason for Participation is not filled in
10. School Data Consent = Agreed but either SSN or Student ID has not been provided
11. Gender is not filled in
12. Primary Activity is not filled in
13. Participant is not in a service component

*In order to correct DOB errors the participant must be deleted and reentered.

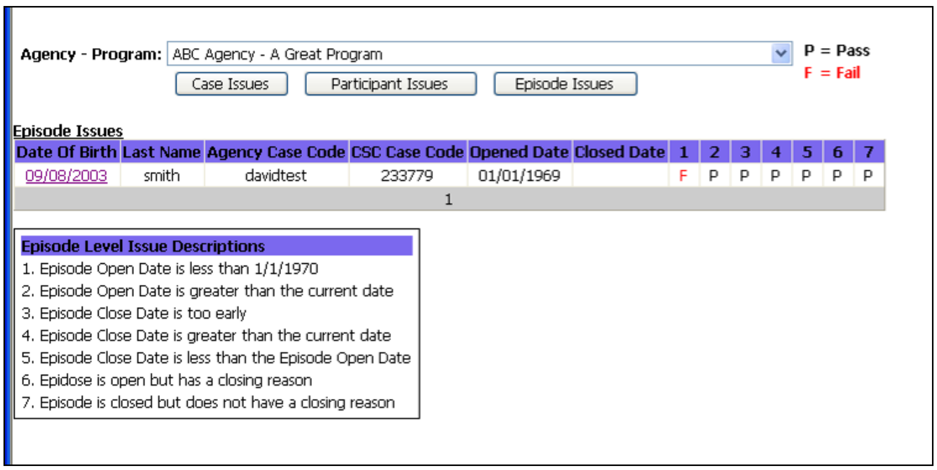
2. You will be transported to the CDG Participant Information screen for the participant. Correct any indicated problems and save the changes by clicking the **Save Data** button.



3. Once the new information has been saved for the participant, the CDG Participant List screen will appear. Click the **Back to Data Cleansing** button to return to the data cleansing results.
4. Move on to the next participant.

Using the CDG Data Cleansing Module to Solve Episode-Level Issues

1. From the SAMIS main menu, click on the **CDG Data Cleansing** module icon under Program Functions.
2. **Choose the appropriate agency and program** from the Agency-Program drop down list.
3. Click the **Episode Issues** button. A list of participants with possible issues will appear.



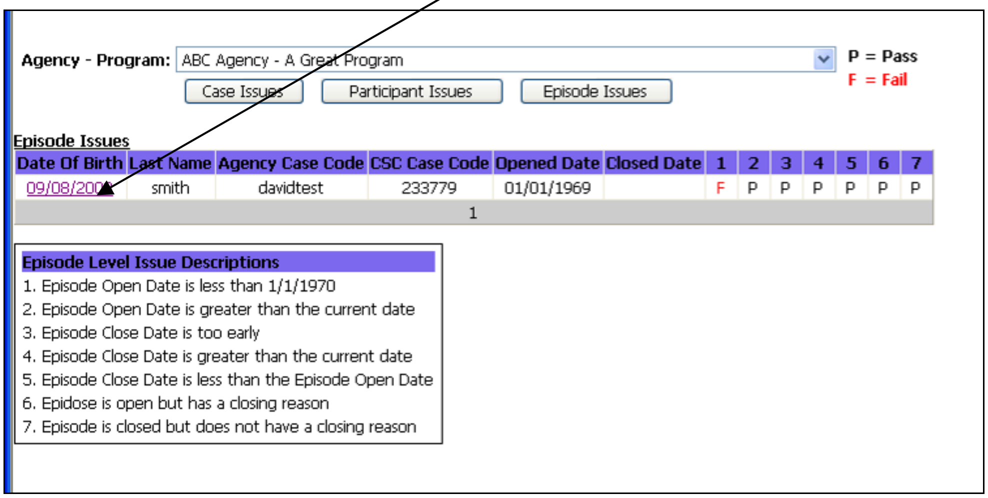
Types of Episode-Level Issues

The results of the Episode-Level CDG Data Cleansing list only episodes with at least one problem. The numbered columns refer to the problem descriptions listed below. An "F" for failing underneath a column indicates that the problem in the related description exists for the listed participant. A "P" for passing indicates no problems in that area.

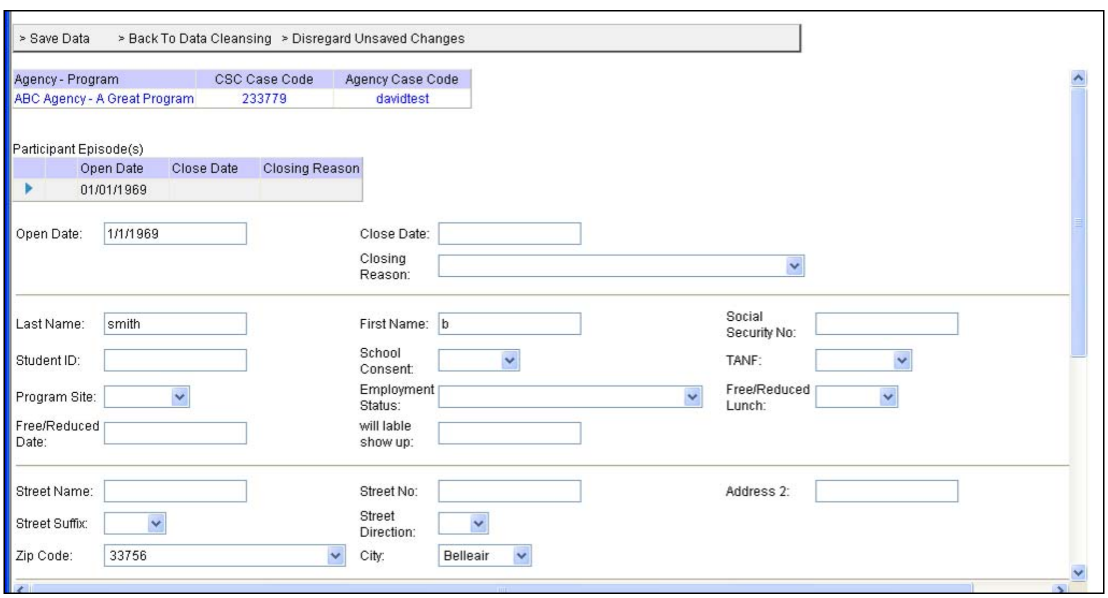
Episode Level Issue Descriptions
1. Episode Open Date is less than 1/1/1970
2. Episode Open Date is greater than the current date
3. Episode Close Date is too early
4. Episode Close Date is greater than the current date
5. Episode Close Date is less than the Episode Open Date
6. Epidose is open but has a closing reason
7. Episode is closed but does not have a closing reason

Solving Episode-Level Issues

1. On the Episode Issues display list, click the **blue, hyperlinked client identifying field** under the first column. The type of information displayed in this first field will be determined by which field is first in the four Client Identifier Fields, designated for a particular program.



2. You will be transported to the CDG Participant Information screen for the episode. Correct any indicated problems and save the changes by clicking the **Save Data** button.



3. Once the new information has been saved for the episode, the CDG Episode List screen will appear. Click the **Back to Data Cleansing** button to return to the data cleansing results.
4. Move on to the next episode.

Chapter 16 - Date Awareness for Closing Cases and Service Components

All dates in SAMIS will default to empty until the user enters a date. SAMIS has the following dates which you must carefully manage:

Episode Opening Date
Episode Closing Date
Service Component Start Date
Service Component End Date
Administration Point Date(s)

If the dates do not occur in the correct time order, SAMIS will not include them in the reported data.

SAMIS Date Rules

- The Episode Close Date should be after the Episode Open Date for any single episode. No Exceptions. Multiple episodes may occur.
- Each Service Component Start Date should be equal to or after the original Episode Open Date. No exceptions.
- Each Service Component End Date should be equal to or before the last Episode Close Date. Exception: If you have a follow up date, which occurs after the participant episode should be closed, you must enter a Service Component End Date, which occurs after the Episode Close Date.
- All Administration Point Dates should be equal to or after their Service Component Start Date and equal to or before their Service Component End Date. No Exceptions.

TAKE NOTE: If an episode has been previously closed, the user must have specific user rights to re-open the episode or modify the Episode Close Date. Contact the SAMIS Helpdesk for access to modify a close date.

Chapter 17 - PICK List Maintenance

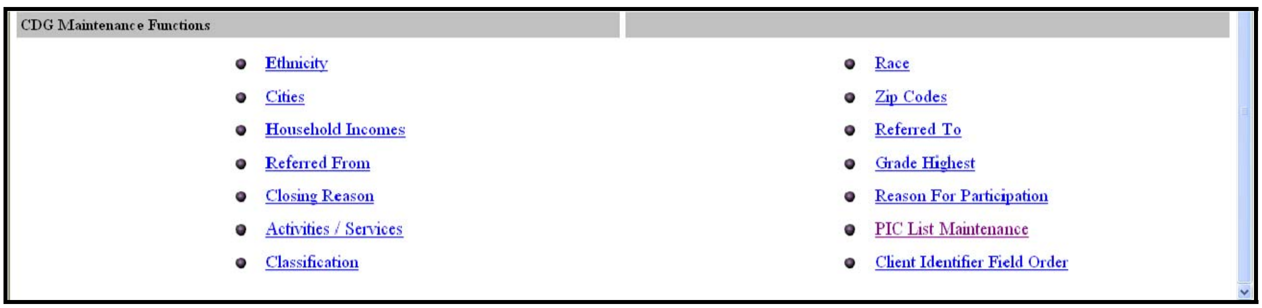
"This Pick List Maintenance will be managed by the Children's Services Council of Broward County"

PICK List Maintenance

Agencies can customize the list of **Services and Activities, Reasons for Participant, Referred From, Referred To, Zip Code, Household Income, Race, Ethnicity, and Current Grade** displayed in the PICK list for each program in SAMIS. This function will be available to persons identified as having access to PICK List Maintenance on the SAMIS Access Request Form.

Setting Up the PICK Lists

Select **PICK List Maintenance** under CDG Maintenance Functions on the SAMIS Main Menu.



Editing the PICK Lists

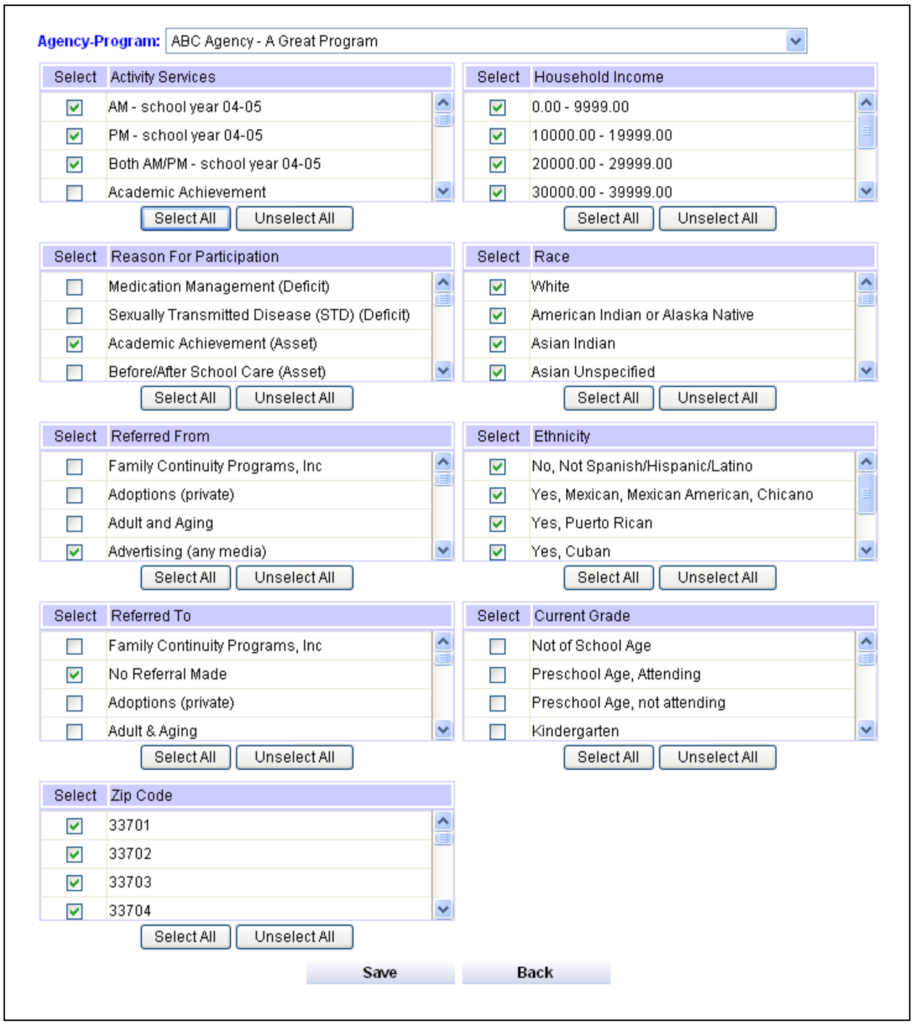
Each box with a scroll bar represents a different pick list on the Case Data Gatherer Screens.

Scroll through each pick list and **check the boxes** next to the items **you wish to see**; **uncheck the boxes** next to the items you **do not wish to see** on your pick list.

OR

You can select all pick list items by clicking the **Select All button**; you can unselect all the items by clicking the **Unselect All button**.

Click **Save** when done.



TAKE NOTE:

When customizing the **PIC List Maintenance** module, please note that if an item was previously selected in a case, it must remain on the "Selected" list in the PIC List Maintenance module. Removing an item from the "Selected" list that was previously chosen for a case will affect the appearance of those fields within the case. In most instances where a pick list item has been deleted, new items will have to be chosen when editing and saving case data.

Chapter 18 - Attendance Tracking

"This Attendance Tracking Module is not being used by the Children's Services Council of Broward County"

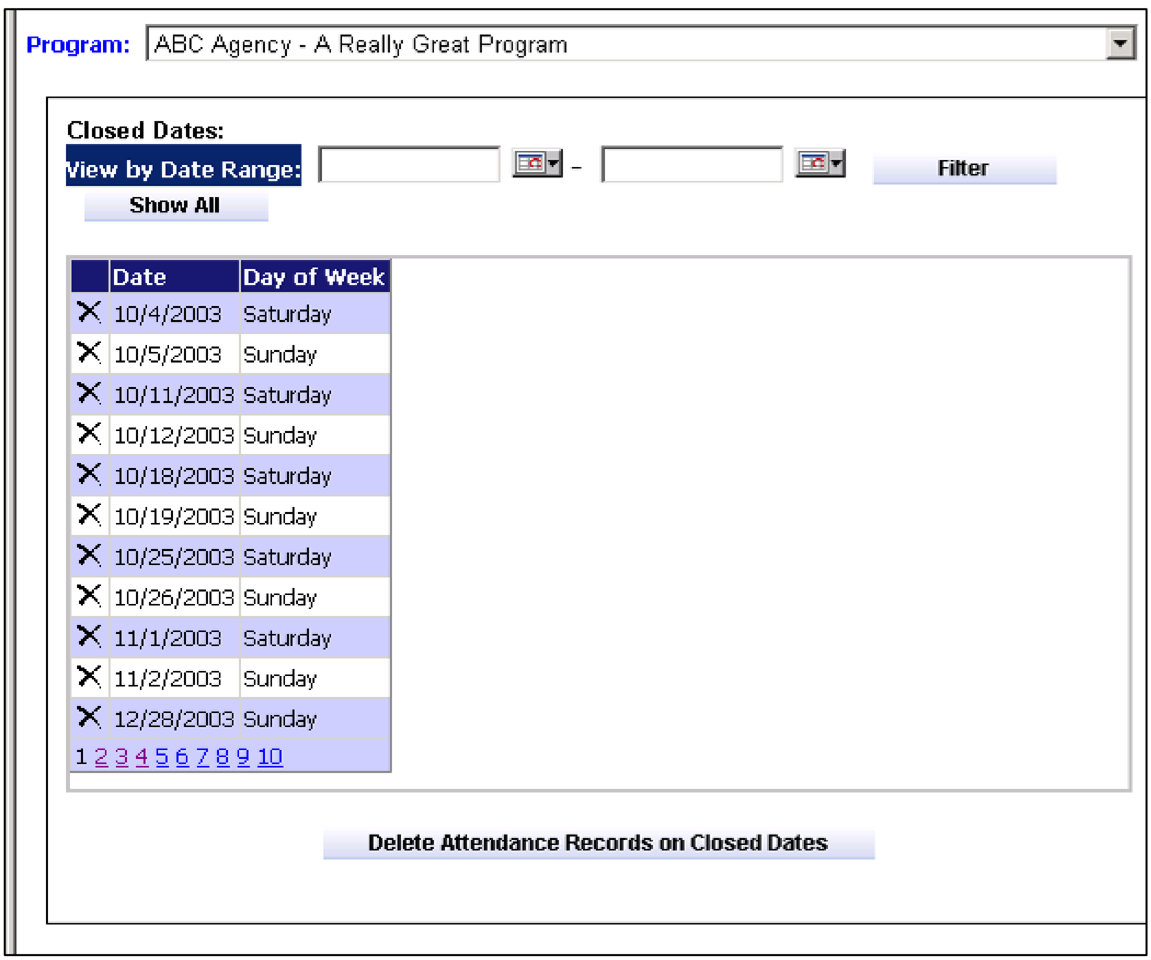
The Attendance Tracking module allows agency users to track day-by-day attendance of program participants.

Excluding Dates through Calendar Maintenance

Prior to using attendance, you will want to exclude dates on which there should be no attendance by using Calendar Maintenance. You can exclude individual days, weekends, or blocks of days.

Accessing Calendar Maintenance

Start by clicking **Calendar Maintenance** under Administration Functions on the SAMIS Main Menu. Any dates selected are stored on multiple pages in the date display window. You can click on successive pages to see more dates.



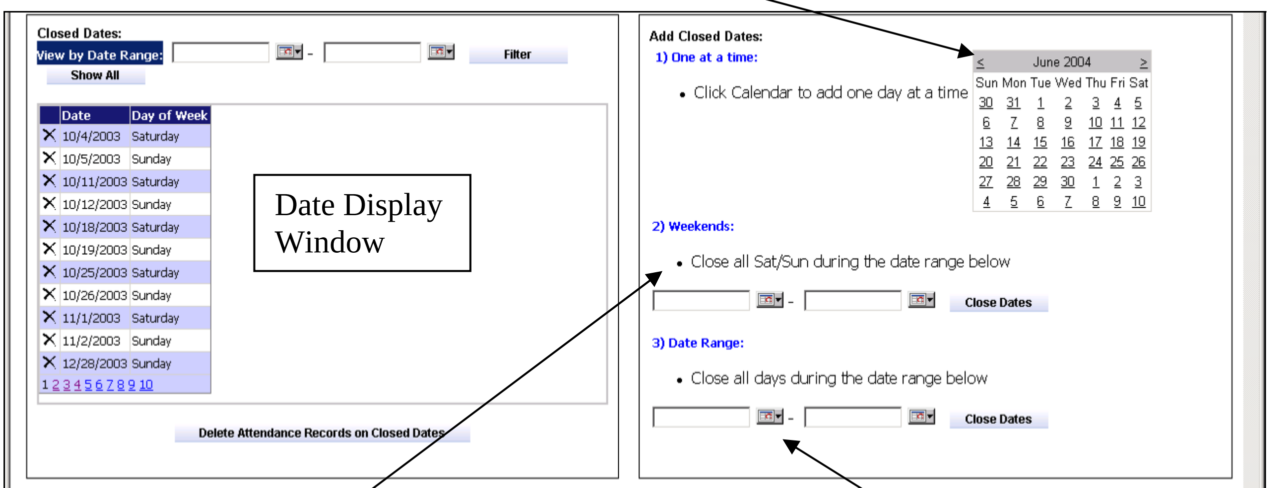
Filtering by Specific Dates

You may view excluded dates either by all dates excluded or by a specific time period.

- **To view dates by a specific time period**, enter a start date and end date into the View by Date Range: boxes. Then click the **Filter** button.
- **To view all dates,** click the **Show All** button. You may switch back and forth from Filtered to Show All and vice versa.

Excluding Dates

To exclude individual dates, use the calendar under "**One at a Time**" to search for the appropriate month and day. Click the day you want to exclude. The system adds that day to the date display window.



To exclude all weekends in a specific date range, enter the date range into the two boxes under "**Weekends**" by typing or using the calendars and clicking the **Close Dates** button. The system adds that day to the date display window.

To exclude all dates for a specific date range, enter the date range into the two boxes under "**Date Range**" by typing or using the calendars and clicking the **Close Dates** button. The system adds that day to the date display window.

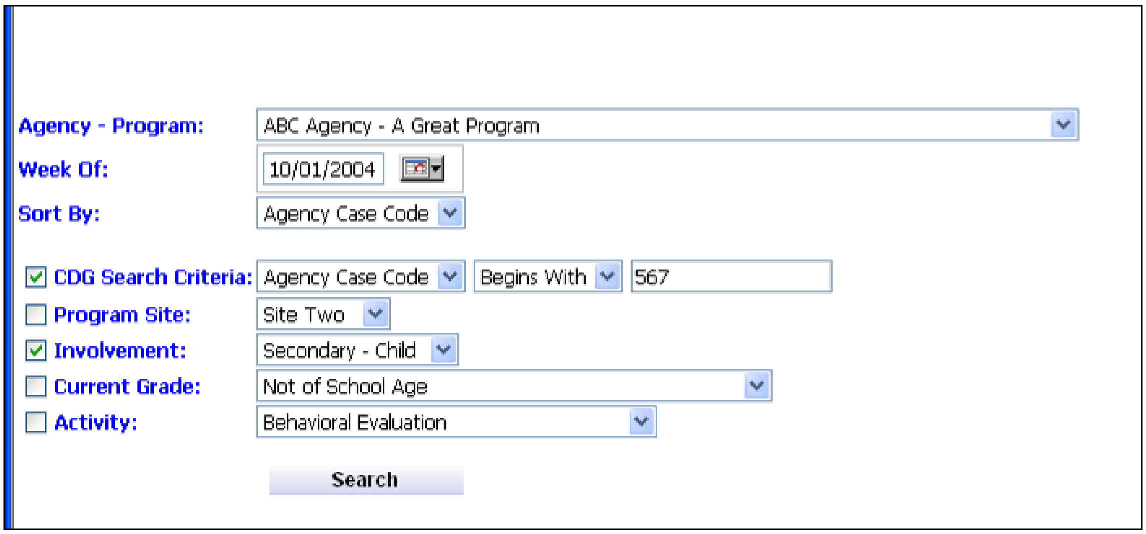
Deleting Attendance Records on All Closed Dates

To delete all attendance records already recorded on the excluded days, listed in the date display window, click the **Delete Attendance Records on Closed Dates** button.

Searching for Attendance Records

To search for attendance records, follow the steps below.

1. From the **SAMIS Main Menu** under Program Functions **Select Attendance Tracking**. The following screen will display.



2. From the Agency - Program drop pick list, **select the program**.
3. In the **Week of** box type the date for the beginning of the week you wish to view (attendance can only be entered for 7 days at a time in the module).
4. Choose to sort automatically by **Agency Case Code or CSC Case Code** from the Sort By pick list.
5. **Click the check boxes next to those optional fields** which you would like to include in the search. You can utilize any combination of optional items to narrow your search.

A. Optionally, you can use any of the **CDG Search Criteria** to search for specific participants by selecting the field you would like to search from the first drop down list.

I. Enter the field to search on using the first drop down box.
II. Select the matching criteria from the second drop down box. (See below for the matching criteria definitions)
III. Enter the value to match during the search in the third text box.

Matching Criteria Definitions:

Matching Criteria	Explanation
Exactly Like	An exact match will be looked for on the selected search field. If nothing matches the value entered in the text box then no results will be returned.
Begins With	If the field being searched for begins with the value entered in the text box then the record will be returned.
Ends With	If the field being searched for ends with the value entered in the text box then the record will be returned.
Contains	If the field being searched for contains the value entered in the text box then the record will be returned.

B. **Optionally, choose the participant involvement type** from the Involvement drop down list. This will determine which participants will be displayed in the search results. (For example, select Primary – Child if the Objective applies only to the primary child). If you don't wish to search for specific involvement types, choose All from the selection list.
C. **Optionally**, **choose a program site** from the Program Site pick list. If program sites have not been defined for your program, there will be no program sites in the pick list.
D. **Optionally**, **select the current grade** for participants from the Current Grade pick list.
E. **Optionally**, **select the activity** associated with the participants you are searching for from the Activity pick list.

6. Click the **Search button.** The following screen will display which will list all participants who were active during the week selected and met the involvement criteria.

Date Of Birth	Last Name	Agency Case Code	CSC Case Code	Quick Select	Fri	Sat	Sun	Mon	Tue	Wed	Thu
06/29/1965		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/12/1985		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/28/1987		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
10/22/1963		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
11/14/1985		19740	167737	M-F	☐	☐	☐	☐	☐	☐	☐
08/22/1983		19953	213982	M-F	☐	☐	☐	☐	☐	☐	☐

Special Notes:

1. All cases that were open any day that week and met the involvement criteria will display.
2. If the case was closed during any part of that week, those days the case was not open will not have check boxes.
3. Those days designated under Calendar Maintenance as the program not offering services will not have check boxes.
4. To re-order by any of the participant information columns, **Select** the column header.
5. The week will start with the Week Of date as selected above. For example in the above screen shot the week starts with Thursday 1/1/2004.
6. The system uses the grade level entered into Current Grade on the participant screen to search by this Current Grade option.

Tracking Attendance

1. For any day the Participant attended the program, place a check box on the corresponding date:
2. If the Participant attended Monday – Friday (everyday) **Select** the **M-F** under the **Quick Select** column.

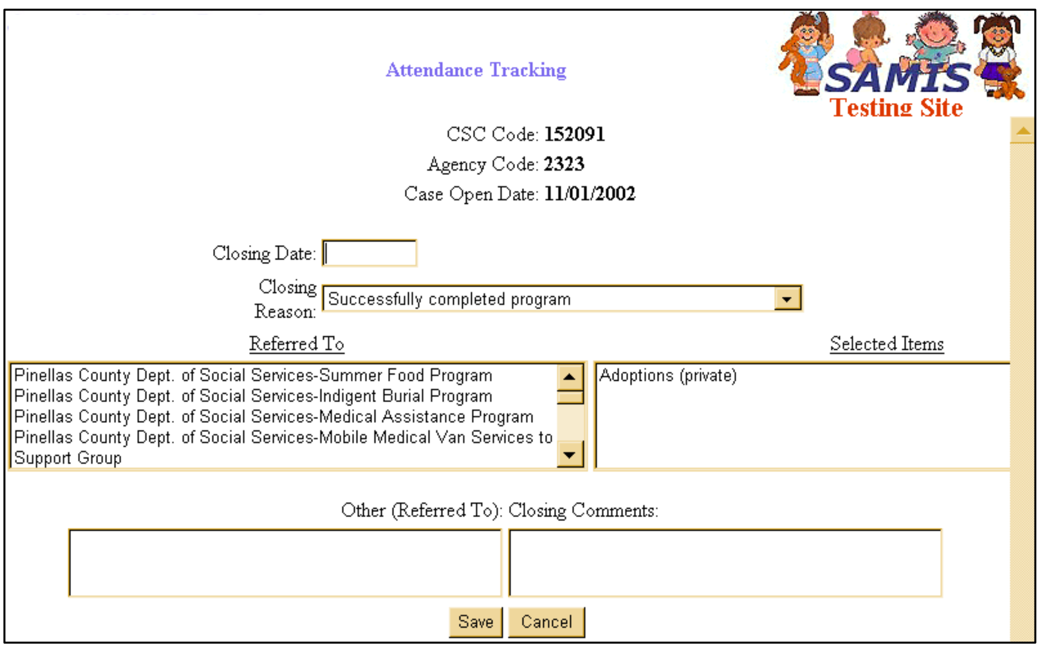
Date Of Birth	Last Name	Agency Case Code	CSC Case Code	Quick Select	Fri	Sat	Sun	Mon	Tue	Wed	Thu
06/29/1965		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/12/1985		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/28/1987		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
10/22/1963		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
11/14/1985		19740	167737	M-F	☐	☐	☐	☐	☐	☐	☐
08/22/1983		19953	213982	M-F	☐	☐	☐	☐	☐	☐	☐
12/23/1987		19989	197354	M-F	☐	☐	☐	☐	☐	☐	☐
01/01/1979		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
06/15/1973		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
08/25/1988		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
04/01/1962		20713	201312	M-F	☐	☐	☐	☐	☐	☐	☐

Closing a Case Through the Attendance Module

CDG Cases can be closed through the Attendance Tracking Module. Any closing information added through this module will also display in the CDG Module of SAMIS. **NOTE:** This closes the entire case, not just the participant.

1. Select the hyperlink of the first column displayed on the Attendance Tracking page for the Participant that belongs to the case you want to close. The following page will display

Date Of Birth	Last Name	Agency Case Code	CSC Case Code	Quick Select	Fri	Sat	Sun	Mon	Tue	Wed	Thu
06/29/1965		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/12/1985		18700	150525	M-F	☐	☐	☐	☐	☐	☐	☐
06/28/1987		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
10/22/1963		19675	208582	M-F	☐	☐	☐	☐	☐	☐	☐
11/14/1985		19740	167737	M-F	☐	☐	☐	☐	☐	☐	☐
08/22/1983		19953	213982	M-F	☐	☐	☐	☐	☐	☐	☐
12/23/1987		19989	197354	M-F	☐	☐	☐	☐	☐	☐	☐
01/01/1979		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
06/15/1973		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
08/25/1988		20540	219625	M-F	☐	☐	☐	☐	☐	☐	☐
04/01/1962		20713	201312	M-F	☐	☐	☐	☐	☐	☐	☐



2. Enter the closing date in the **Closing Date** field in **mm/dd/yyyy** format.
3. Select the closing reason by clicking on the **Closing Reason** drop down box.
4. Select the referred to values from the **Referred To** box.
5. Enter the name of any **<u>Referred to</u>** parties not in the **Referred To** list by clicking in the **(Other Referred To)** and typing the appropriate information.
6. Click the **Save** button to save changes.

Chapter 19 - Program Units of Service

The Program Units of Service module will allow the agency to track units of services that program participants receive. The agency can enter the information participant by participant or utilize the rapid fill option. Agencies will also have the ability to adjust units of service where the time period for the unit has already been billed. To utilize this module, you must be given user access.

Understanding a Unit of Service

A Units of Service (UOS) definition is comprised of three main components:

1. Quantity – the amount of service rendered
2. Measurement – what the amount is measuring (e.g. hours, days)
3. Dollar Value – the value of 1 UOS

The combination of all three will make up a UOS definition in SAMIS. For example, one UOS could be defined as 2 Hours with a value of $100 dollars. A UOS will be defined and setup for each activity in a program by the CSC.

Example:

Program: Test Program
Activities

- Teen Council
- Support Group
- After school Care

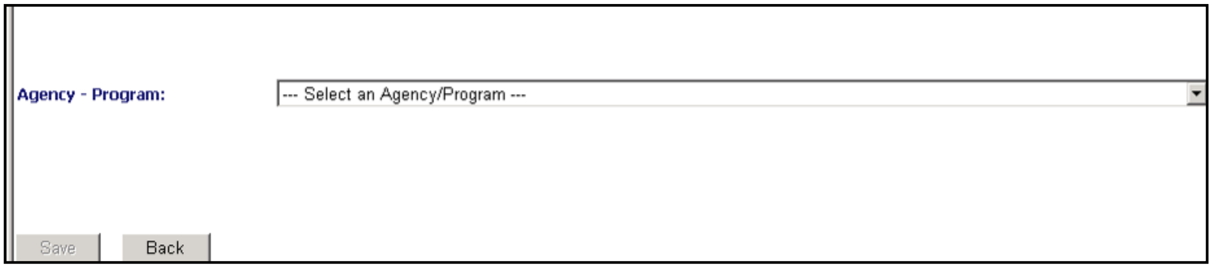
Activity	Quantity	Measurement	Dollar Value
Teen Council	2	Hours	$200
Support Group	7	Sessions	$1,000
After school Care	1	Day	$50

The actual UOS's will be set up by the CSC and correspond with the activities your program utilizes for participants in SAMIS. UOS's can be set up on both primary and secondary activities.

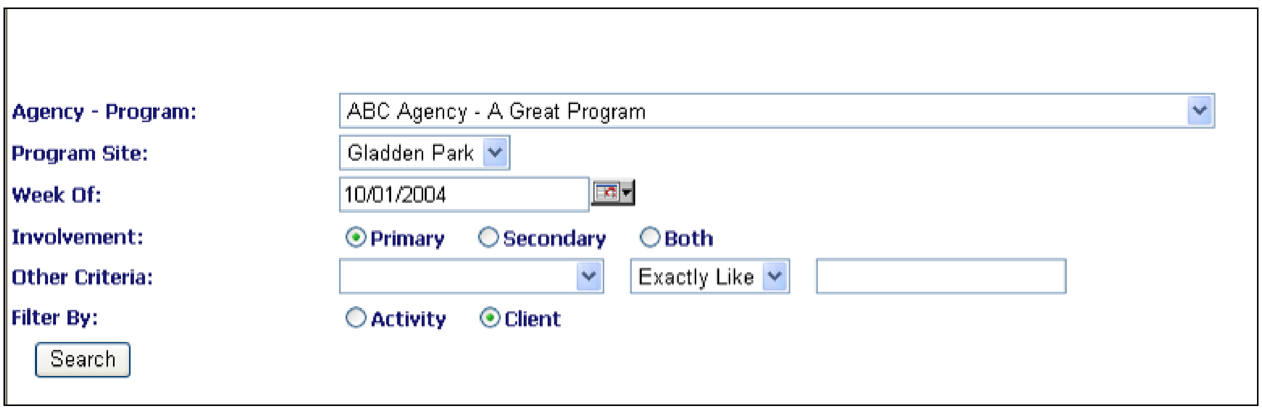
Participants

This module allows the user to search for a participant(s) based on selected criteria and enter in individual units of service for the selected participant.

From the **SAMIS Main Menu** under Program Functions **Select Program Units of Service**. The following screen will display.



1. From the **Agency - Program** drop down list, **Select** the program. The following page will display.



2. C**hoose a program site** *"this step does not apply to the CSC of Broward County"* from the Program Site pick list. If program sites have not been defined for your program, there will be no program sites in the pick list. Leave the program site blank to search by the entire program.
3. In the **Week of** box type the date for the beginning of the week you wish to view (UOS can only be entered for 7 days at a time in this module).
4. **Choose the participant involvement type** from the Involvement radio buttons. This will determine which participants will be displayed in the search results.
5. **Optionally**, you can use any of the **CDG Search Criteria** to search for specific participants by selecting the field you would like to search from the first drop down list.

   A. Enter the field to search on using the first drop down box.
   B. Select the matching criteria from the second drop down box. (See below for the matching criteria definitions)
   C. Enter the value to match during the search in the third text box.

Matching Criteria Definitions:

Matching Criteria	Explanation
Exactly Like	An exact match will be looked for on the selected search field. If nothing matches the value entered in the text box then no results will be returned.
Begins With	If the field being searched for begins with the value entered in the text box then the record will be returned.
Ends With	If the field being searched for ends with the value entered in the text box then the record will be returned.
Contains	If the field being searched for contains the value entered in the text box then the record will be returned.

6. From the **Filter By** selections select either **Activity** or **Participant**. This determines the view in which the data will be entered.
7. If selecting the **Activity** radio button from **Filter By**, from the **Activity** drop down list select the Activity you wish to view then proceed on to Activity View below

   OR

   If selecting the **Participant** radio button from **Filter By**, proceed on to Participant View below
8. **Select** the **Search** button to begin the search based on the criteria selected

Understanding the Two Views Used for Data Entry

The Filter By selection determines which views the user will see when entering Program Units of Service. There are two possible views: Activity and Participant.

<u>Participant View:</u>

When the participant view is chosen, a list of all participants in open cases for the specified week and meeting the specified criteria will be displayed. This will provide you the opportunity to select a specific participant and enter the Units of Services received for that participant based upon the activities entered for them in the CDG module.

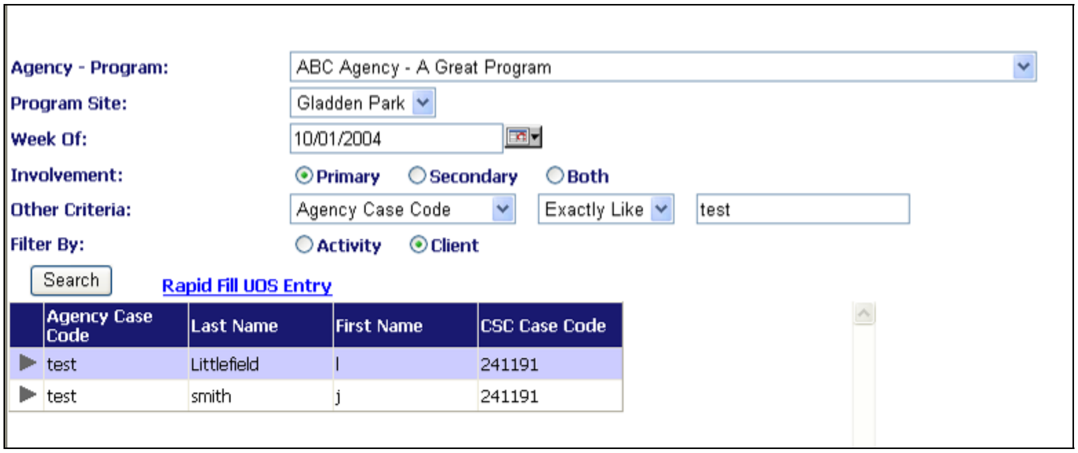
The detail data displayed for each participant will correspond to the following fields to identify the participant. Each program can have up to 4 fields that will display. The CSC will perform setup of these 4 fields. Other fields in SAMIS can be utilized by contracting the SAMIS Systems Administrator.

Available fields:

- Agency Case Code
- Participant Name
- Participant ID
- CSC Case Code (i.e. CSC ID)
- Date Of Birth
- Identifying Char
- School ID
- SSN

By **Selecting Participant** view, the following screen will be displayed:

The first section will display all participants who are active in the program during the week and meet the other search criteria selected.



Entering the UOS for a Participant

1. Select the (arrow) associated with the participant you want to enter information on. The screen will then display the selected participant along with all the primary and secondary activities associated to the participant***. Note: the primary and secondary activities displayed for the participant are the same activities that were selected for the participant through the CDG module.***
2. Each activity's unit of service definition (i.e. what constitutes 1 unit of service, as setup by the CSC) will be displayed.
3. Enter number of units for the activity for each day of the week. (All values entered must be positive) Once data entry is complete select save and then you will be able to move onto the next participant.
4. **Select Save** to save the changes OR **Back** to return to previous page.

Partial Units (i.e., .5) will only be allowed if the Unit of Service has been setup by the to allow partial units.

A	Barnhart		Camp H - 3006
A	Black		D-4007
A	Blackford		Camp H - 6013

Client Information

First Name	Last Name	Soc Sec Num	Agency Case Code
A	Adams		Camp H - 2020

UOS Definitions

One Unit of Service	Value	Allow Partial Unit	Start Date	End Date	Note
Full Day Summer Camp - GP - 9200 - 1 Day(s)	20.47	Yes	05/26/2003		9200 - One full day of summer camp, minimum of 5 hours per child, per day. Attendance must be timed in and out by child in writing each day. Days of partial attendance of 2 to 5 hours may be billed at a single subunit rate of 50%, or $10.24.

Enter the UOS for the selected client.

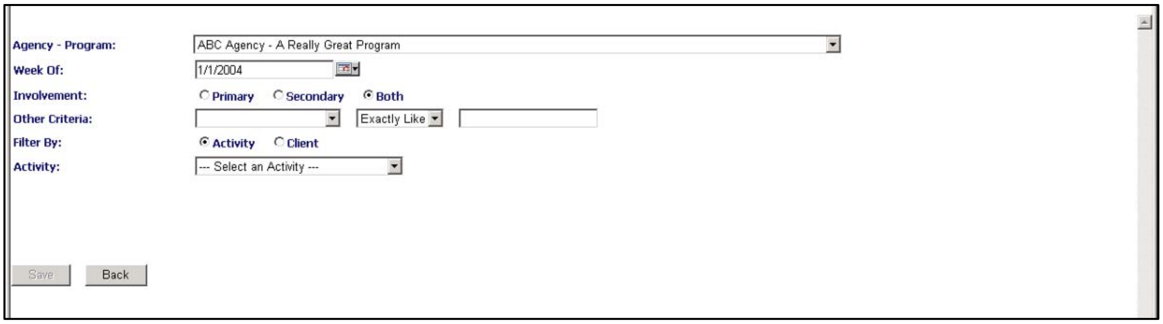
Activity	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
Full Day Summer Camp - GP -9200		2	2	1			

Save Back Make sure to save your data before exiting!

Activity View:

When the Activity view is chosen, a combo box of all activities in the program will be displayed to the user. When an Activity is selected from the combo box, a list of participants associated to the selected activity (either by Primary or Secondary activity) will be displayed. You will have the ability to enter the units for each day of the week for the selected activity.

By selecting Activity View, the following screen will be displayed:

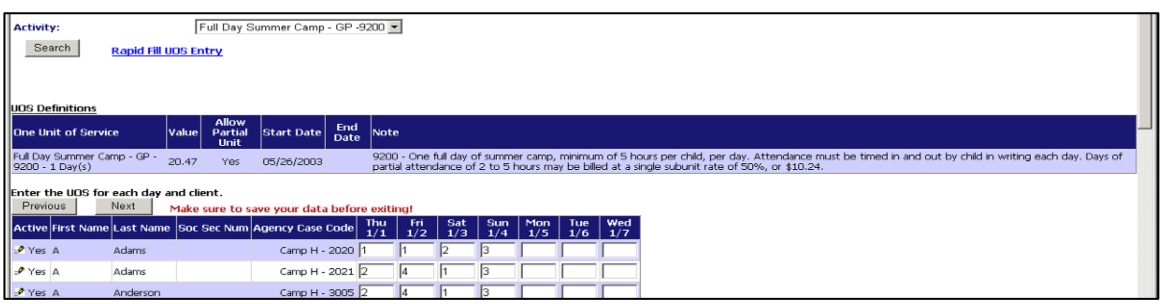


Entering the UOS for an Activity

1. **Select** the **Activity** from the Activity drop down box.
2. Select Search
3. All participants with that activity selected on either primary or secondary activities in CDG will be displayed.
4. **Enter** the number of units for each day of the week for the selected activity.
5. Utilize the **Next** and **Previous** buttons to scroll through the list of participants (50 participants show per page). Next and previous buttons save automatically.
6. Once data entry is complete Select Save and then you will be able to move onto the next participant.

Partial Units (enter as: 1.5) will only be allowed if the Unit of Service has been setup by the to allow partial units.

Days that are selected under Calendar Maintenance as the program not offering services will not be available for data entry.

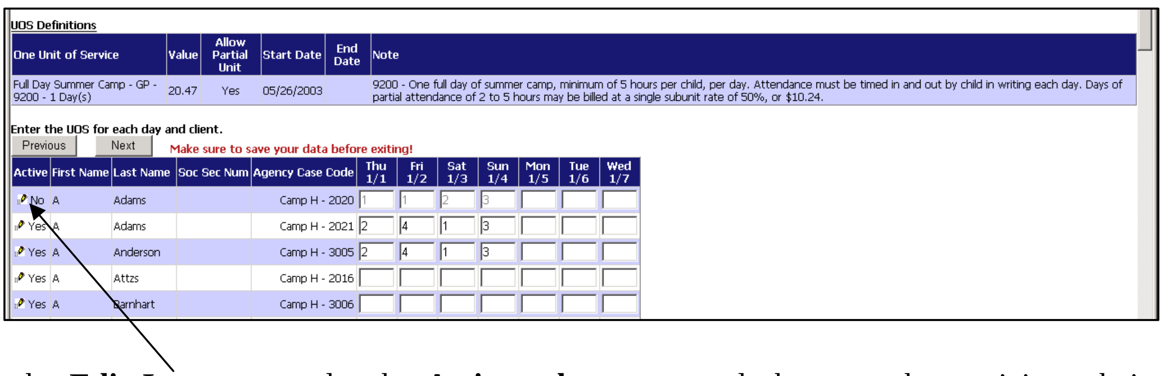


Inactivating a Participant from an Activity

Participants who are no longer receiving services can be inactivated. If a participant has been inactivated, the participant will not receive any units of service when rapid fill is utilized and the entry boxes for the units will not accept data (this applies to all activities).

Note that any UOS records already captured for the participant will remain in the system. In inactivation is not date sensitive; it simply disallows any further activity for the participant. The user can re-enable a participant at any time re-enabling both the manual entry and rapid fill entry of UOS records.

Active participants are indicated by a **Yes** in the active field. **Inactive** participants are indicated with a **No**.

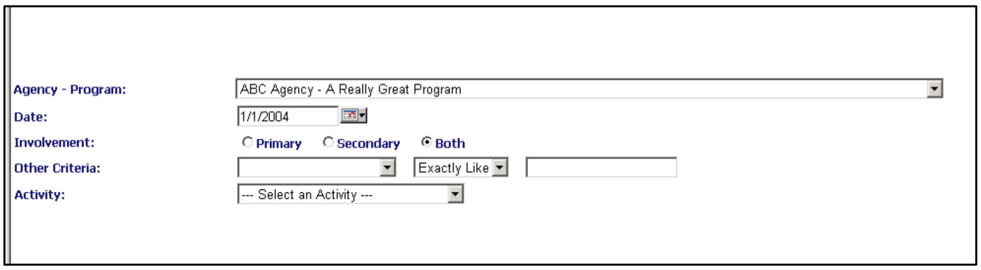


Select the **Edit Icon** next under the **Active column** to toggle between the participant being active or not.

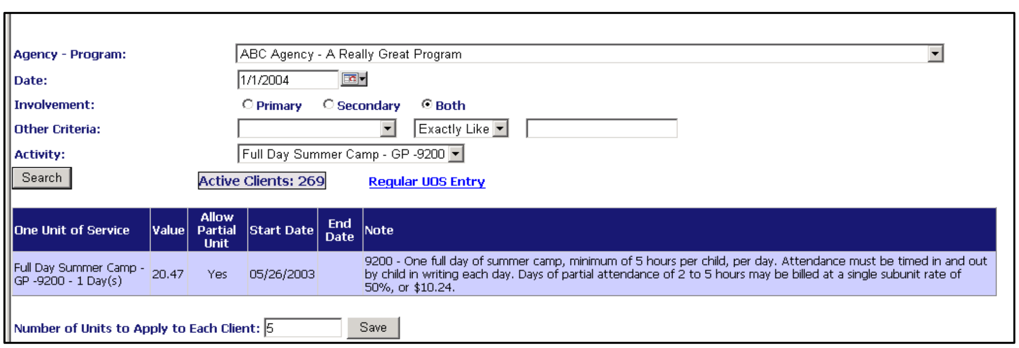
Program Units of Service Rapid Fill

The Program Units of Service Rapid Fill allows an agency to enter the same units for multiple participants in an activity for a specified date at one time. Criteria can also be made to limit which participants receive the Unit of Service. Once this is done, agencies can back to the participant Program Units of Service screen and modify an exceptions. This should greatly reduce the amount of time entering in a unit that applies to multiple participants.

1. From the Samis Main Menu, Select Units of Service Rapid Fill.
2. **Select** the agency/program from the **Agency-Program** drop down list. The following screen will display

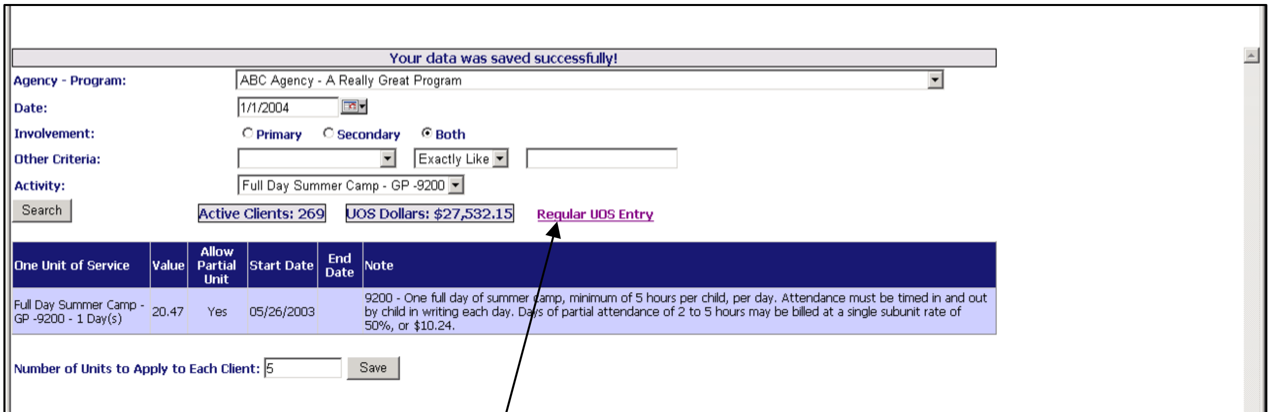


3. Criteria can than be utilized to limit which participants the rapid fill applies to. Only those participants who meet the criteria will have the rapid fill units attached.
4. In the **Date** box **Enter** (or utilize the calendar to select) the date in which rapid fill UOS will be entered.
5. To rapid fill only primary or secondary participants, **Select** the appropriate radio button under **Involvement**
6. To limit the rapid fill by Other Criteria:
7. **Enter** the field to search on using the first drop down box.
8. **Under Other Criteria, Select** the matching criteria from the second drop down box.
9. **Enter** the value to match during the search in the third text box.
10. **Select Search**, the following page will display with the PUOS description associated with the activity.



11. **Enter** in the number of units to apply to each participant.

12. Select Save. Only the participants who are active, match the criteria used to search and who are active will have this unit applied for the day selected.



13. The number of participants affected and the UOS dollars will display.

14. Utilize the **Regular UOS Entry hyperlink** to switch to the regular units of service entry screen to modify participants who need to be modified.

Chapter 20 - Volunteer Activity

"This Volunteer Activity Module is not being used by the Children's Services Council of Broward County"

The **Volunteer Activity** screen is accessed from the **Volunteer Activity Search** screen. This screen displays the number of volunteers accepted, volunteers used and volunteer hours used for each month of the selected fiscal year. Users will be able to edit, recalculate, and save data on this screen.

Definitions

VOLUNTEER -A volunteer is an individual who provides a direct service or who assists in administrative matters, for no reimbursement of time and effort. Do not include a Board Member's time or volunteer time spent for fundraising purposes. Do not include individuals who are performing court-ordered community service.

ACCEPTED: This is the unduplicated number of new volunteers who were accepted month by month. The column total will be an unduplicated count for the fiscal year. The first month of the fiscal year should reflect the entire pool of volunteers at that time. All subsequent months should only include new volunteers.

USED: This is the number of all volunteers used month by month. A volunteer can be counted in all applicable months. The column total will in most cases be a duplicated count.

HOURS: This is the number of hours provided by all volunteers for a given month. The column total will reflect all hours provided during the fiscal year.

Volunteer information for adults and/or children should be entered monthly into SAMIS. If there is no volunteer activity for a month, enter zero's in the number of volunteer **Hours.**

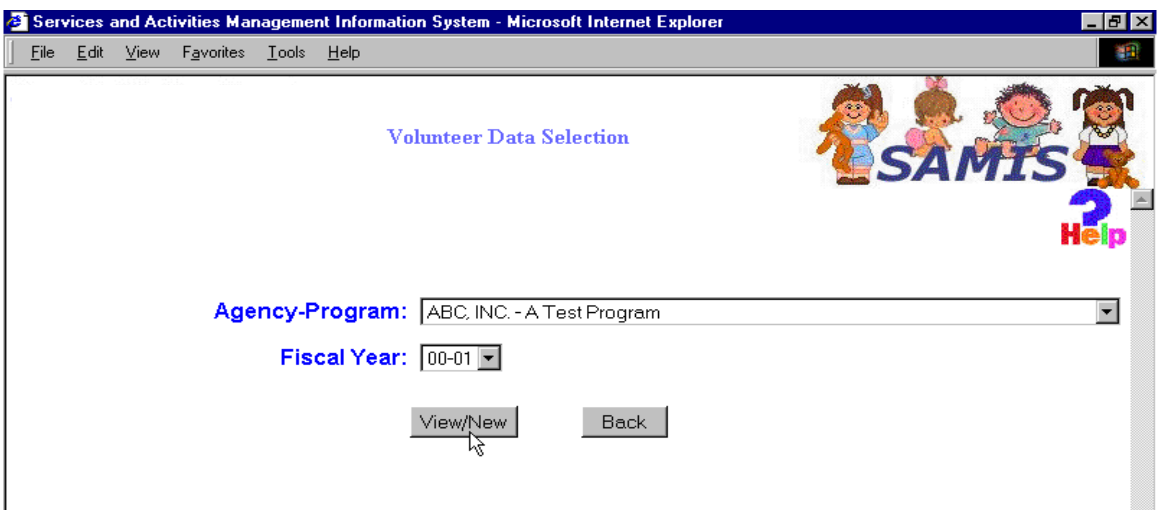
TAKE NOTE: The List of monthly volunteer hours can be printed for presentation to your agency's Board or other management groups. Select File/Print/ [Select the printer]/OK or select the Printer Icon on the tool bar.

Volunteer Activity Search

The **Volunteer Activity Search** screen is accessed from the **SAMIS Main Menu** and allows the user to view or enter volunteer information for a specific program and fiscal year. Specifically, the module is to identify volunteer utilization (for direct program services or administrative support) month by month and for the entire fiscal year.

How to Search For Volunteer Activity Data

1. Select a program from the **Agency-Program** drop down box.
2. Select a fiscal year from the **Fiscal Year** drop down box.
3. Click on the **View/New** button to view volunteer activity for the selected agency-program and fiscal year combination. If no volunteer activity has been previously entered, a new volunteer activity worksheet will be created.
4. Click the **Back** button to return to the SAMIS Main Menu.



TAKE NOTE: Once the user has selected an Agency-Program combination from any of the Agency-Program Pic lists in SAMIS (except Attendance Tracking), the same Agency-Program combination will be pre-selected in the Pic lists for that user's session. Once the user exits SAMIS or the session times out, the Agency-Program combination will not be pre-selected upon entering back into the application, hence it is only for the lifetime of the current session.

Adding or Editing Volunteer Activities

Volunteer Search Results

	Adults			Children		
Month	Accepted	Used	Hours	Accepted	Used	Hours
October	25	15	10	78	45	140
November	2	27	46	2	80	145
December	0	0	0	0	0	0
January	0	0	0	0	0	0
February	0	0	0	0	0	0
March	0	0	0	0	0	0
April	0	0	0	0	0	0
May	0	0	0	0	0	0
June	0	0	0	0	0	0
July	0	0	0	0	0	0
August	0	0	0	0	0	0
September	0	0	0	0	0	0
Totals	27	42	56	80	125	285

Recalc Save Back

How to Add or Edit Volunteer Data

1. Click in the box where you want to change or add data. The boxes only accept numeric values.
2. If a value exists, highlight the number and type in the new value.
3. Click on the **Recalculate** button to view the results without saving the changes, or
4. Click on the **Save** button to save the changes, or
5. Click on the **Back** button to discard changes and return to the **Volunteer Activity Search** screen.

TAKE NOTE:

- Only numeric values can be entered in the text boxes.
- The Fiscal Year is October 1 – September 30.

Chapter 21 - Group Activities

"This Group Activities Module is not being used by the Children's Services Council of Broward County"

The **Group Activities** module was developed for programs which (a) cannot use the **CDG** (Case Data Gatherer) module because they provide services solely in groups, without opening cases yet need a way to count service activities and participants; and (b) for programs which currently use the **CDG**, but in addition serve participants in group settings where the collection of demographic data is either impossible, impractical, or unnecessary in accordance with best practice. The **Group Activities** module enables the user to select an activity type, give it a name, date range of the activity, record the number of children and adults who participated, and indicate whether this was a collaboration with another agency or not. Totals for both adults and children will also be displayed as well as the number of activities within a specific fiscal year.

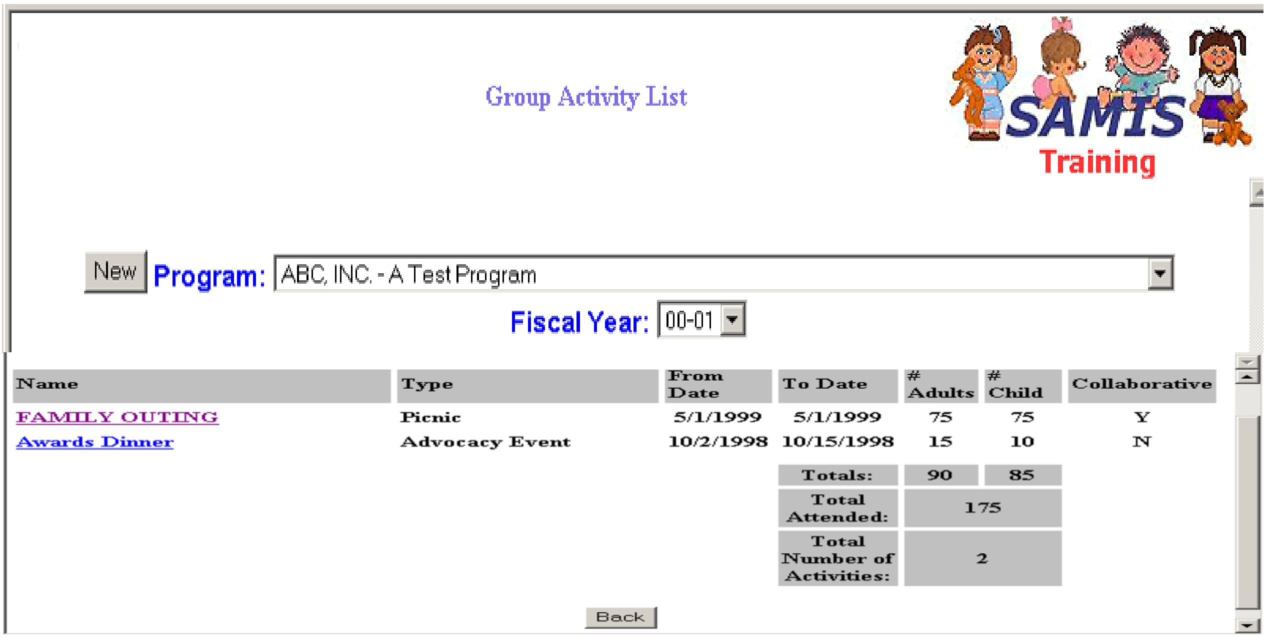
The Group Activities information is recorded by the CSC fiscal year - October through September.

Access to the **Group Activities** screen must be negotiated between the Program and the CSC Contract Manager.

The **Group Activities Search** screen is accessed from the **SAMIS Main Menu**.

How to Search for Group Activity Data

The Group Activity list screen can be printed as a report to Board, Staff or for other funders. Totals reflect the activity for the selected fiscal year.



Name	Type	From Date	To Date	# Adults	# Child	Collaborative
FAMILY OUTING	Picnic	5/1/1999	5/1/1999	75	75	Y
Awards Dinner	Advocacy Event	10/2/1998	10/15/1998	15	10	N
			Totals:	90	85	
			Total Attended:	175		
			Total Number of Activities:	2		

Select a program from the **Program** drop down box.

1. Select a fiscal year from the **Fiscal Year** drop down box.
2. Any group activities that exist for the selected **Program/Fiscal Year** combination will be displayed on the screen.
3. Click the hyperlink under the **Name** column to view or edit a group activity, or
4. Click the **New** button to create a new group activity.

TAKE NOTE: The Fiscal Year is October 1 – September 30.

Group Activities Detail

The **Group Activities Detail** screen is accessed from the **Group Activity List** screen by clicking on the **New** button or clicking on the hyperlink corresponding to the name of the activity to be edited. The purpose of this screen is to enter information for new Group Activities or edit information for existing Group Activities.

How to Add or Edit Group Activity Data

1. Select the **activity type** from the **Activity Type** drop down box.

2. Select the Fiscal Year from the **Fiscal Year** drop down box.

3. Enter the name of the activity in the **Name** field.

4. Enter the beginning date of the activity in the **From Date** field. When moving off this field, the **To Date** field will be populated with the **From Date** entry. *If the activity only lasts one day, leave the dates the same.* If the activity is over 2 or more days, enter the ending date for the activity in the To Date field. (Activity dates can be selected from a calendar by clicking on the button next to the date field.)

5. Enter the number of adults attending the activity in the **# Adults** field.

6. Enter the number of children attending the activity in the **# Child** field.

7. Choose whether the group activity is collaborative by selecting **Yes** or **No** from the drop down box.

8. Click **Save** to save and submit the information entered or,

9. Click **Back** to discard changes and return to the **Group Activity Search** screen.

TAKE NOTE:
Data must be entered in all fields.

Chapter 22 - SAMIS Consolidated Reports Overview

SAMIS Consolidated Reports are web based and have been designed to assist managers and data entry staff with the task of reviewing the status of JWB funded programs. The SAMIS Reporting system will assist the user to:

- Identify service patterns and trends
- Evaluate progress towards meeting contract requirements
- Identify Quality Assurance and CQI activities
- Target data cleaning activities
- Analyze the rate of JWB expenditures and reimbursements.
- Conduct budget planning

The Consolidated Reporting module provides access from a single screen, to all Program and Fiscal reports generated in SAMIS. Reports are displayed by specific report groups. CDG, Measurable Objective, Attendance, and Waiting List groups are utilized. The table below summarizes the variety of reports available from SAMIS.

Reporting Group	Report	Description
CDG	Active Cases	The Active Cases Reports displays a list of all active cases for the date range selected including first episode open/close dates, current case length and # of participants in cases. This report may be run at the CSC, agency or program level.
	Cases Opened and Closed	The Cases Opened and Closed report can be run at the agency or program level. It lists the following for the date range selected: new cases opened, new participants in New Cases, New Participants in Existing Cases, Cases Closed, Participants in Closed Cases, and Participants in Open cases.
	Client Level Detail	The Client Level Detail report provides all case information, and participant information, along with the Measurable Objectives information entered into SAMIS for the specific client and requires that the CSC Case Code be included in the report parameters. Client data can be searched time period or by selected criteria. This report may also be accessed from Case Data Gatherer search results.

	Episodes of Service Summary	The Episodes of Service Summary report can be run by agency, program or classification with an option to get unduplicated counts by client code or SS#. The report displays the unduplicated count of participants and includes the number of episodes and a total number of episodes for the selected date range.
	Group Activity MSL	The Group Activity MSL report can be run by program and fiscal year. This report compares the pre-determined Group Minimum Service Levels to actual group activities entered into SAMIS and provides a % achieved. It also provides a count of group sessions by activity type.
	Manual MO and MSL	The Manual MO and MSL can be run by program and fiscal year. It provides a summary of the information input into the Manual Measurable Objectives module including information on whether or not the MO and MSL were met.
	Master Table	The Master Table report displays the information in all PIC lists (Including the associated ID used for EDI) and whether the item on the list is selected for the program. It also will list any optional fields turned on for the program selected.
	Performance	The Performance Report when run by Fiscal year at the program level provides a summary of services levels related to children and adults served. The total number of children and adults entered into SAMIS, as of the date the report is run, is compared to the minimum services levels contained in the CSC contract.
	Performance by Objective	Performance reports can also be run by participants who met or did not meet specific measurable objectives. This report is useful for spotting demographic trends in participants relative to performance on measurable outcomes.
	Program Sites	The Program Site report can be run by program and lists all sites set up for the program including site name, number, open/close dates, site type, address and contact information.

	Program Units of Service Activity	The Program Units of Service Activity report can be run at the agency or program level and date range. In addition, if run at the program level a program site can be utilized to narrow the results. The report displays any units collected during the date range with the associated activity, value and total number of units (original, adjusted and net).
	Program Units of Service Client	The Program Units of Service Client report can be run by agency or program and date Range. The report displays all participants who have units for the selected time period and displays the total number of units (original and adjusted) that they have for each activity.
	Quarterly Report	The Quarterly report is currently only utilized by Jacksonville. It gathers Attendance, Program Units of Service and Quarterly Commentary information into a report which can be presented to their board.
	Referrals To Detail	The Referrals To Detail report can be run by program, date range, referred to reason, CDG search criteria and/or involvement. It displays the number of participants referred to each option and provides a count of unduplicated participants.
	School Data Consent Compliance	The School Data Consent Compliance report displays of list of those participants who does not have school data consent filled in on the CDG screens and also provides information as to whether the student ID and/or SS# have been filled in.
	User Info	The User Info report is run by selecting a user. All of the access information for the selected user is displayed.
Attendance	Attendance Sign-In Sheet	The Attendance Sign-In Sheet report can be run by program, involvement, current grade and by since added to CDG case date. It displays all participants who meet the report criteria conditions along with their scanning bar code, identifying information and a place for the participant to sign in. This report is utilized for scanning attendance.
	Attendance Utilization	This report allows the user to generate summary data regarding attendance by participant for a specified program, fiscal year or date range, and participant involvement

		type. This report can only be run at the program level.
	Calendar Bar Code	The Calendar Bar Code report is run by month and year and provides a barcode for each day of the calendar. This is utilized for scanning attendance data only.
	Hand Held Bar Code List	The Hand Held Bar Code List report provides a bar code for each participant who meets the report parameters selected. I can be run on several different Avery type labels or in the format of a role list. This report is utilized for scanning attendance data only.
	Monthly Attendance	This report will display a list of all active clients in the program or the week selected for the report parameters. This report can act as a manual daily attendance roster, and can that be used as the source document for data entry into the SAMIS Attendance Module. This report can only be run at the program level.
	Weekly Attendance	The Weekly Attendance report can be run by program, program site, and/or involvement for a specified week. The report will list all of the participants active that week and display the attendance that is entered during the time period.
Measurable Objectives	Measurable Objectives Detail	The Measurable Objective Detailed Report, when used in conjunction with the Measurable Objective Summary Report, will provide detailed information to explain performance rates and patterns. Independently, the report will highlight cases with Measurable Objective data entry issues.
	Measurable Objectives Summary	The MO Summary Report provides general information about the performance of participants as a whole on the program's measurable objectives.
	MO Participant Details	The MO Participant Detail report can be run by program, date range and involvement. It displays all participants who meet the criteria and displays information regarding their MO status. This information includes: the service component they are in, SC start and end dates, # of admin points, last admin point date and the status (measured or not).

	Participant Summary	This report summarizes how many participants, according to involvement type, have been attached to at least one of the available service components and how many have not been attached to any of the available service components. In addition, the report provides a list of specific primary clients who have not been attached to any of the available service components.
Waiting List	Waiting List Detail	The Waiting List Detail report lists all of the participants who are currently on the waiting list including when they were added to the waiting list and how long they have been on the waiting list. A pie chart is also including displaying information on length of time on waiting list. This report is run by program.
	Waiting List Funding	The Waiting List Funding reports displays information on all of the waiting lists for all programs in SAMIS for the CSC. It displays aggregate information on average stay and how long participants have been on the lists.
	Waiting List Trend	The Waiting List Trend report is run by program and wait list. It provides month by month information regarding participants who where inactivated from the list and the reason why; and lists the average length of stay for inactive people.

Chapter 23 - Running SAMIS Reports

Locating and Accessing SAMIS Reports

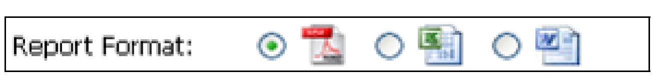
All SAMIS reports are accessed from the SAMIS Main Menu, after the user has logged on to the SAMIS web site – https://www.samiscsc.org. SAMIS Consolidated Reports is a securitized module and the users must request access to this feature to view any reports. The user can request access by Report Group or for individual reports in a report Group.

For information on the parameters and specifics of all reports, please consult the SAMIS Report Manual or the SAMIS helpdesk.

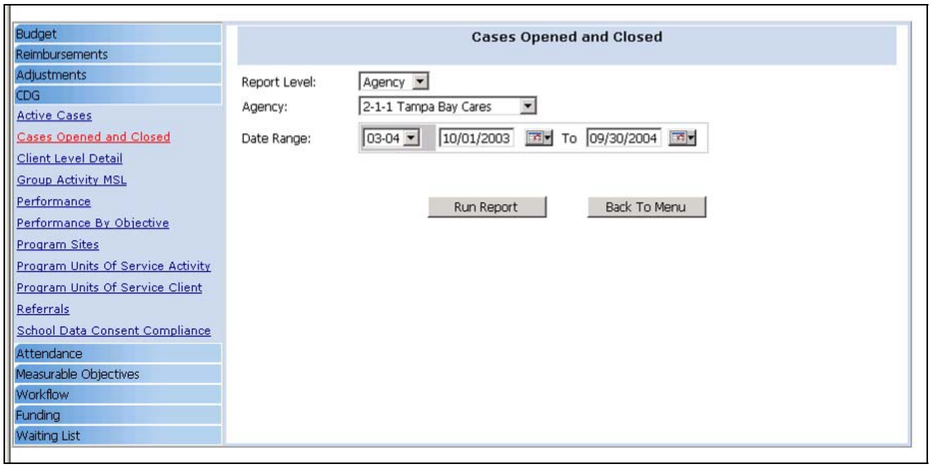
Running Reports

1. Logon to SAMIS – https://www.samiscsc.org
2. From the SAMIS Main Menu, select Consolidated Reporting.
3. Select the report group.

4. Populate the parameter screen.
5. If the report utilizes a direct export method, as seen in the screen shot below. Then choose the format by selecting the appropriate radio button: Acrobat, Excel, or Word. Otherwise, skip this step.

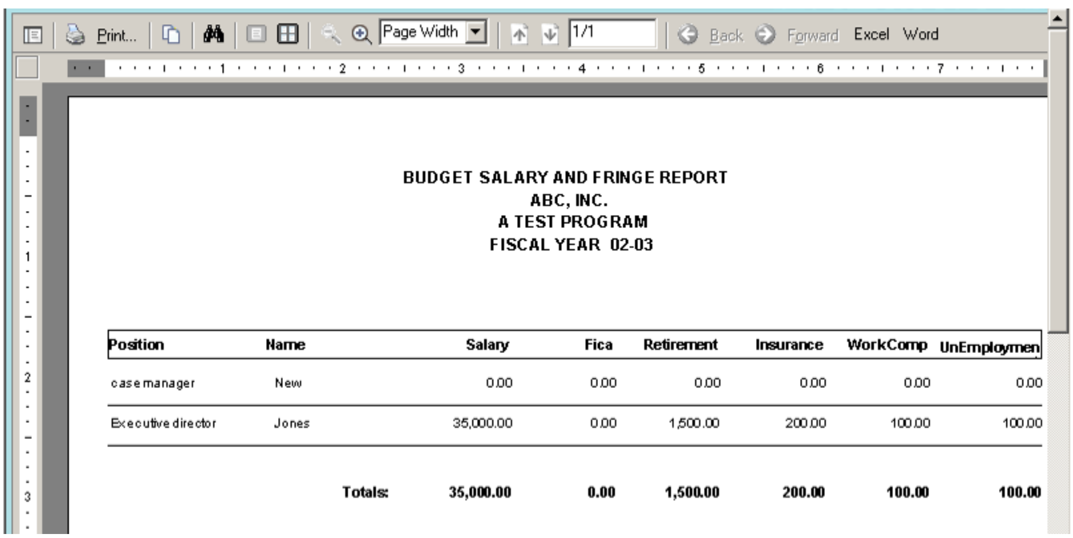


6. Select **Run Report**.



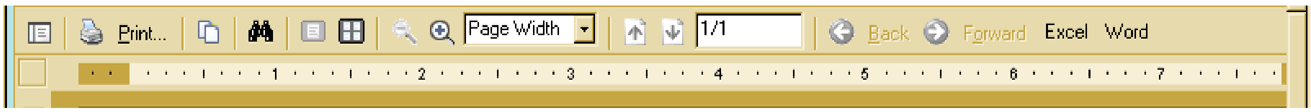
The Report Viewer Window

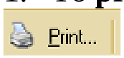
The **Report Viewer Window** displays the selected report for most reports. **If the report uses a direct export method as detailed above, then the chosen format of the report is utilized, rather than the report viewer window.** All report functions include printing, navigating and exporting to Word and Excel, are selected using the tool bar inside the report viewer window.



To view the report, move the scroll bar on the right to the bottom and move the scroll bar on the bottom of the report to the right. A second scroll bar will be revealed. Use this scroll bar to move up and down the report. You can also use the hand to "grab" and move through the report.

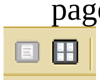
Icons in the Report Viewer Window



1. To **print** the report, use the "printer" icons in the tool bar on the report screen.


2. To **copy** the report, select the "double paper" icons in the tool bar with the report screen. The report than can be pasted into a word processor or spreadsheet program.


3. To **search** for a word or phrase within the report, select the "binoculars" icon from the tool bar. Type the information you are looking for in the Find What? text box.


4. To **display more than one page** at a time, use the "windows" icon to select how many pages you would like to view.


5. To **zoom** in and out, use the – or + magnifying glasses or the drop down box.


6. To **navigate** from page to page use the page up and down icons. The current page the user is on will appear in the text box. The Back and Forward icons can also be utilized to navigate.


7. To export the report to **Word** or **Excel**, select the application into which you wish to export by clicking the appropriate button.


8. All exported files will automatically save to the C:/Temp location. Also, the file will be given a generic name when it is placed in the C:/Temp folder. To access the C:/Temp folder, double click **My Computer** on your desktop. Then double click **Local Disk (C:)**. Next double click the **temp** folder.

Appendix A - SAMIS Definitions

Active Cases – Cases that were open at any time during the date range selected.

Administration Point – the date or dates when the outcome was assessed or measured. For example: the "Pre" date might be when the last semester ended (i.e. Dec 31, 2000), whereas the "Post" date would be when the current semester ends (i.e. May 15, 2001).

CDG – Case Data Gather. The module in SAMIS that records participant information. Measurable Objectives are accessed for the individual participants from this module.

CSC – Children's Services Council. The Juvenile Welfare Board is a CSC.

Case – A case is the basic organizational structure of SAMIS. All Participants are assigned to a case. While a case must contain at least one Primary Participant, there can be more than one Participant in a case.

Example 1 – A Childcare center will open a Case for each child admitted to the program. If multiple children from one family attend the same childcare center, the focus of service will determine if the children are considered one Case or multiple Cases. See definitions of Primary and Secondary Participants below.

Example 2 - A married couple attends marital counseling. Both would be entered as one Case if the treatment plan were directed towards both individual Participants.

EDI –Electronic Data Interchange

Frequency – the frequency with which an individual participates in a service component. For example, an individual might participate five days per month in tutoring or four hours per week in parenting training.

Group Outcomes –A level of outcome objectives that measure the effect of the program at the group level rather than at the individual participant level. Group-level measurable objectives will not be entered in SAMIS but will be reported manually
An example of a group-level outcome objective is as follows:

Seventy percent (70%) of parents attending a community presentation will indicate that the presentation was beneficial in terms of personal development as measured by a score of at least twenty (20) points on the Parent Satisfaction Questionnaire. The Parent Satisfaction Questionnaire will be completed at the time of presentation completion (post).

Individual Outcome Objectives -level outcome objectives measure the benefits individual participants in a program receive. Individual-level measurable objectives will be entered in SAMIS. An example of an individual-level outcome objective is as follows:

Fifty percent (50%) of youth in their first year of program participation will improve their leadership skills by the end of the first year of program participation as measured by at least a ten percent (10%) increase in scores (an increase of at least fifteen (15) points) from pre to post on the Youth Leadership Life Skills Development Scale (YLLSDS). The YLLSDS will be given when the youth enter the program (pre) and at the end of the first year of program participation or when the youth leave the program (post).

Measure – the construct or topic to be measured. Variables can also be termed "Indicator". For example: "Grade in Math." Each variable will have an Administration Point, Frequency and Responses.

Measurable Objective – a written statement that describes something that is to be measured and achieved to determine the effectiveness of a Service Component. Each Measurable Objective will be measured using Variables.

Example: "Seventy percent (70%) of youth who have been in the tutoring program for a minimum of two months will maintain a satisfactory grade (defined as L or P in kindergarten through second grade and a C or better in grades 3 and above) or improve their grades in Math by the time program participation ends as measured by the difference between pre and post school report card letter grades. School report cards will be reviewed for the grading period before starting the program (pre) and for the semester during which program participation ends (post)."

MO – Measurable Objective

Outcome Objectives - Outcome objectives describe the expected result of a program's services on individuals who participate in the program. Outcome objectives can be measured at the individual or group level.

Primary Participant - The person(s) for whom the program is designed, is the main focus of program services, and is expected to receive the most benefits from program participation. All services must be face-to-face. Effective for the 2002-2003 fiscal year, all primary participants must have an objective.

Example – Two adults receiving marital therapy. Both adults are the primary if the case plan is directed at addressing behaviors of both individuals. The children of the couple would be considered secondary if they received some face-to-face services.

Participant(s) -A participant is defined as a person receiving face-to-face program services in a CSC funded program. Participants are entered into SAMIS and assigned a unique identifier based on the first initial, last name and date of birth. The unique identifier is stored in the SAMIS database and but does not appear on any screen viewed by the users. Participants can only be retrieved from SAMIS with the CSC or Agency Case Code.

Process objectives -describe a procedure, task, or activity which will be completed by the program during a given time period. An example of a process objective is as follows:

The program will draft a two-year plan and timeline detailing the establishment and implementation of an intergenerational cultural partnership and will begin to identify potential cultures for inclusion during the 2002-03 fiscal year.
Like group level measurable objectives, process objectives will not be entered in SAMIS but will be reported manually.

Queries – Structured statements used to generate a specific response from a database. Queries are used in R-EDI to assist in the analysis of SAMIS data.

Responses – the information or data collected for a participant as stated in a measurable objective. Responses can be the items on a questionnaire or survey, or a variety of other types of information. For example: "L, P, A, B, C, D, F".

Reverse EDI – A module in SAMIS that allows the user to extract Case Data Gatherer (CDG) and Attendance Tracking data entered by the agency into SAMIS.

Secondary Participant - The person(s) who receives services in support of/conjunction with the primary participant. The secondary participant is expected to participate in some, but not all services/activities. All services must be face-to-face.

Example – A child receives day treatment services and the parents and other family members attend 1-2 family sessions. The family would be secondary participants. The diagnosis/assessment and focus of the treatment is on the child receiving day treatment services.

Service Components– categories of service and/or activities offered by a program. For example, Program A may offer the service components of Tutoring and Parenting Workshops. A program's service components are identified and defined in the Program Methodology (Part 1 of the Program Narrative). Each Service Component will have one or more Measurable Objective(s). Service Components should be designed to measure a specific group and activity.

Examples –Adult Counseling
Youth Counseling
Tutoring – Age 10-14

Appendix B - SAMIS Manuals

SAMIS Manuals can be downloaded from the SAMIS announcement screen - https://www.samiscsc.org

The SAMIS Announcement Screen contains the following manuals:

SAMIS Fiscal Manual
SAMIS Program Manual
SAMIS Report Manual
Reverse EDI Manual
EDI Manual

Appendix C – SAMIS Access Request Forms

SAMIS access request forms are available from the SAMIS Downloads page of the SAMIS Announcements Pages.